HOUSING AUTHORITY OF THE CITY OF FORT MYERS

PHA Plans

5 Year Plan for Fiscal Years 2000 - 2004 Annual Plan for Fiscal Year 2002

Subitted January 15, 2002 Fl047v02 submitted March 13, 2002

NOTE: THIS PHA PLANS TEMPLATE (HUD 50075) IS TO BE COMPLETED IN ACCORDANCE WITH INSTRUCTIONS LOCATED IN APPLICABLE PIH NOTICES

PHA Plan Agency Identification

PHA Name: FORT MYERS HOUSING AUTHORITY
PHA Number: FL047
PHA Fiscal Year Beginning: (mm/yyyy) 04/2002
Public Access to Information
Information regarding any activities outlined in this plan can be obtained by contacting: (select all that apply)
Display Locations For PHA Plans and Supporting Documents
The PHA Plans (including attachments) are available for public inspection at: (select all that apply) Main administrative office of the PHA PHA development management offices PHA local offices Main administrative office of the local government Main administrative office of the County government Main administrative office of the State government Public library PHA website Other (list below)
PHA Plan Supporting Documents are available for inspection at: (select all that apply) Main business office of the PHA PHA development management offices Other (list below)

5-YEAR PLAN PHA FISCAL YEARS 2000 - 2004

[24 CFR Part 903.5]

A. N	Mission
	he PHA's mission for serving the needs of low-income, very low income, and extremely low- e families in the PHA's jurisdiction. (select one of the choices below)
	The mission of the PHA is the same as that of the Department of Housing and Urban Development: To promote adequate and affordable housing, economic opportunity and a suitable living environment free from discrimination.
	The PHA's mission is: (state mission here)
	The Mission of the Fort Myers Housing Authority is to provide affordable, quality housing, services and opportunities to low income families and ensure a continuum of housing opportunities for all program participants and a broad range of redevelopment activities directed toward improving communities.
	<u>Goals</u>
empha identify PHAS SUCC (Quant	pals and objectives listed below are derived from HUD's strategic Goals and Objectives and those sized in recent legislation. PHAs may select any of these goals and objectives as their own, or other goals and/or objectives. Whether selecting the HUD -suggested objectives or their own, a ARE STRONGLY ENCOURAGED TO IDENTIFY QUANTIFIABLE MEASURES OF CESS IN REACHING THEIR OBJECTIVES OVER THE COURSE OF THE 5 YEARS. tifiable measures would include targets such as: numbers of families served or PHAS scores ed.) PHAs should identify these measures in the spaces to the right of or below the stated ives.
HUD housi	Strategic Goal: Increase the availability of decent, safe, and affordable ing.
	PHA Goal: Expand the supply of assisted housing Objectives: Apply for additional rental vouchers: Reduce public housing vacancies: Leverage private or other public funds to create additional housing opportunities: Acquire or build units or developments Other (list below)
	PHA Goal: Improve the quality of assisted housing

Improve public housing management: (PHAS score) Improve voucher management: (SEMAP score)

Objectives:

		Increase customer satisfaction: Concentrate on efforts to improve specific management functions: (list; e.g., public housing finance; voucher unit inspections) Renovate or modernize public housing units: Demolish or dispose of obsolete public housing: Provide replacement public housing: Provide replacement vouchers: Other: (list below)
	Objecti	oal: Increase assisted housing choices ves: Provide voucher mobility counseling: Conduct outreach efforts to potential voucher landlords Increase voucher payment standards Implement voucher homeownership program: Implement public housing or other homeownership programs: Implement public housing site-based waiting lists: Convert public housing to vouchers: Other: (list below)
HUD S	Strategi	c Goal: Improve community quality of life and economic vitality
	Objecti	oal: Provide an improved living environment ves: Implement measures to deconcentrate poverty by bringing higher income public housing households into lower income developments: Implement measures to promote income mixing in public housing by assuring access for lower income families into higher income developments: Implement public housing security improvements: Designate developments or buildings for particular resident groups (elderly, persons with disabilities) Other: (list below)
	Strategi dividua	c Goal: Promote self-sufficiency and asset development of families ls
house	nolds	oal: Promote self-sufficiency and asset development of assisted
		ves: Increase the number and percentage of employed persons in assisted families:

		Provide or attract supportive services to improve assistance recipients' employability: Provide or attract supportive services to increase independence for the elderly or families with disabilities. Other: (list below)
HUD	Strateg	ic Goal: Ensure Equal Opportunity in Housing for all Americans
	PHA (Object	Goal: Ensure equal opportunity and affirmatively further fair housing tives: Undertake affirmative measures to ensure access to assisted housing regardless of race, color, religion national origin, sex, familial status, and disability: Undertake affirmative measures to provide a suitable living environment for families living in assisted housing, regardless of race, color, religion national origin, sex, familial status, and disability: Undertake affirmative measures to ensure accessible housing to persons with all varieties of disabilities regardless of unit size required: Other: (list below)
Other	SUMM	Goals and Objectives: (list below) ARY OF ACTIVITIES UNDERTAKEN BY FMHA DURING FY200& 2001 ARD ACHIEVING THE FMHA GOALS & OBJECTIVES: Maintain a High Occupancy Rate of Rental Units • FMHA has incorporated use of outside maintenance service contractors to supplement the in-house efforts. • FMHA has developed a marketing plan which is being
	II.	 implemented. Revised Intake procedures and developed automated system for processing applications Implemented flat rents Upgrading the existing housing stock Inspected units to determine costs and extent of needed
	III.	 renovations Developed "Force Account" labor for modernization effort Providing additional affordable rental housing stock Created additional housing by purchasing Horizons in Oct 2000 for fair market rental. Prepared a study of housing needs in 2000
	IV. V.	 Ensure long-term viability of the agency Met with City to discuss City's Section 8 program Improve the quality and process for delivery of resident services Investigated services provided by outside agencies

- Investigated need to provide existing transportation system.
 Met with local transportation provider to tailor routes for public housing residents
- Purchased additional van for resident transport
- Investigated start-up opportunities for adult education through
 - A. Community Technology Grant (Application 2001)
 - B. Microsoft Neighborhood Network Center Grant application (FY 2001)
 - C. Public Housing Drug Elimination Grant FY 2001
 - D. Multi-Family Housing Drug Elimination Grant FY 2001
 - E. ROSS Resident Opportunities Grant FY 2001
 - F. New Approach Drug Grant FY 2000

VI. Provide programs that support and/or encourage economic opportunity for residents

- Surveyed local providers and collected information on programs which promote resident self-sufficiency
- Submitted Community Technology Center Grant (D. of Ed)
- Submitted ROSS Resident Opportunities Grant (HUD)
- Met with Lee Tran to improve transportation for Residents
- VII. Establish a Housing Consortium/Mini District
- VIII. Create Homeownership Opportunities
- IX. Change the face of public housing along with public perception.
 - Conducted a salary comparability study in FY 2000
 - Begin Training Programs in FY 2001
 - <u>Community Service</u>: Information on the program is sent monthly to residents with their billing. Resident Initiatives Coordinator of FMHA attends all Resident Counci Meetings and interacts with residents, following up and mediating complaints.
 - Neighborhood Appearance: The FMHA is making every effort to improve neighborhood appearance. Within the next 90 days, it will be switching over to the City Trash pick-up, which provides larger containers for trash. The FMHA is ordering the cans. Further, the FMHA is stepping up enforcement of lease violations having to do with littering.
 - <u>Safety</u>: The FMHA is focusing on evictions to better ensure resident safety. In the past 6 to 9 months, it has stepped up its lease violations. Additionally, the FMHA has hired a s a Fraud Investigator, all activities geared to improving resident safety and security in Public Housing.

Annual PHA Plan- Fort Myers Housing Authority PHA Fiscal Year 2002

<u>ı. Ann</u>	uai Fian Type:
Select which	ch type of Annual Plan the PHA will submit.
\boxtimes s	tandard Plan
Streamli	ned Plan:
Г	High Performing PHA
F	Small Agency (<250 Public Housing Units)
<u> </u>	
	Administering Section 8 Only
T	roubled Agency Plan

ii. Executive Summary of the Annual PHA Plan

[24 CFR Part 903.7 9 (r)]

Americal Dlam Trumos

Provide a brief overview of the information in the Annual Plan, including highlights of major initiatives and discretionary policies the PHA has included in the Annual Plan.

The Fort Myers Housing Authority has developed a set of goals and objectives as part of its planning process designed to provide a comprehensive approach to accomplish- ing its overall mission. The Plan was developed in concert with the Consolidated Plan to address affordable housing needs for low and moderately low income residents of Fort Myers by operating safe, secure housing and providing programs that support and encourage economic opportunities for residents. An integral part of the Plan is an on-going review of all FMHA operations to improve service delivery, achieve maximum fiscal prudence and maximize revenue from both conventional and non-conventional sources. Additionally, the FMHA will focus on increasing resident involvement and safety and on improving neighborhood appearance.

During 2001, the FMHA fully implemented the Community Service Program. The FMHA also saw its waiting list increase from 225 to 303. The waiting list complies with income and racial deconcentration initiatives. It now has more very low income and low income applicants (up from 7% in 2000 to 16% in 2001), indicating a need for housing over a wide scope of incomes on the PH wait list. The same percentage (55%) of the wait list is families with children. However, this year there has been an increase in the number of elderly applicants (8% to 15%). Whereas last year the number of European/American applicants was 36%, this year it is 46%; and last year the number of African American applicants on the wait list was 64%, this year is 54%. The waiting list for 1 BR units has increased this year from last (39% to 46%), while the demand for 2 BR units this year has decreased from 34% to 29%.

Overall, the FMHA will concentrate on achieving operational excellence in FY 2002.

iii. Annual Plan Table of Contents

 $[24\ CFR\ Part\ 903.7\ 9\ (r)]$ Provide a table of contents for the Annual Plan, including attachments, and a list of supporting documents available for public inspection.

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Δt	tack	nments	
		which attachments are provided by selecting all that apply. Provide the attachment's r	name (A.
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		ATE file submission from the PHA Plans file, provide the file name in parentheses in	the space
to 1	he ri	ght of the title.	
R e	anir	red Attachments:	
	 	Admissions Policy for Deconcentration	
X]	FY 2002 Capital Fund Program Annual Statement fl047a02.xls	
	<u>.</u>]	Most recent board-approved operating budget (Required Attachment for	or PHAs
	J	that are troubled or at risk of being designated troubled ONLY)	71 1 117 13
		and the decision of all home of coming accompliance to account of the first	
	Op	tional Attachments:	
		PHA Management Organizational Chart	
		-	

FY 2002 Capital Fund Program & 5 Year Action Plan- fl047a02 &
fl074b02.xls
☐ Public Housing Drug Elimination Program (PHDEP) Plan
Comments of Resident Advisory Board or Boards (must be attached if not
included in PHA Plan text).
Other (List below, providing each attachment name)
fl047c02.xls – Final report FY2000 CFP #FL14P04750100
fl047d02 xls – P & E Report FY2001 CFP #FL14P04750101

Supporting Documents Available for Review

Indicate which documents are available for public review by placing a mark in the "Applicable & On Display" column in the appropriate rows. All listed documents must be on display if applicable to the program activities conducted by the PHA.

List of Supporting Documents Available for Review						
Applicable & On Display	Supporting Document	Applicable Plan Component				
X	PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations	5 Year and Annual Plans				
X	State/Local Government Certification of Consistency with the Consolidated Plan	5 Year and Annual Plans				
X	Fair Housing Documentation: Records reflecting that the PHA has examined its programs or proposed programs, identified any impediments to fair housing choice in those programs, addressed or is addressing those impediments in a reasonable fashion in view of the resources available, and worked or is working with local jurisdictions to implement any of the jurisdictions' initiatives to affirmatively further fair housing that require the PHA's involvement.	5 Year and Annual Plans				
X	Consolidated Plan for the jurisdiction/s in which the PHA is located (which includes the Analysis of Impediments to Fair Housing Choice (AI))) and any additional backup data to support statement of housing needs in the jurisdiction	Annual Plan: Housing Needs				
X	Most recent board-approved operating budget for the public housing program	Annual Plan: Financial Resources;				
X	Public Housing Admissions and (Continued) Occupancy Policy (A&O), which includes the Tenant Selection and Assignment Plan [TSAP] Section 8 Administrative Plan	Annual Plan: Eligibility, Selection, and Admissions Policies Annual Plan: Eligibility, Selection, and Admissions Policies				
X	Public Housing Deconcentration and Income Mixing Documentation: 1. PHA board certifications of compliance with deconcentration requirements (section 16(a) of the US Housing Act of 1937, as implemented in the 2/18/99 Quality Housing and Work Responsibility Act Initial Guidance; Notice and any further HUD guidance) and 2. Documentation of the required deconcentration and income mixing analysis	Annual Plan: Eligibility, Selection, and Admissions Policies				

List of Supporting Documents Available for Review						
Applicable &	Supporting Document	Applicable Plan Component				
On Display		1.71				
X	Public housing rent determination policies, including the methodology for setting public housing flat rents check here if included in the public housing	Annual Plan: Rent Determination				
	A & O Policy					
X	Schedule of flat rents offered at each public housing development Check here if included in the public housing A & O Policy	Annual Plan: Rent Determination				
	Section 8 rent determination (payment standard) policies check here if included in Section 8 Administrative Plan	Annual Plan: Rent Determination				
X	Public housing management and maintenance policy documents, including policies for the prevention or eradication of pest infestation (including cockroach infestation)	Annual Plan: Operations and Maintenance				
X	Public housing grievance procedures check here if included in the public housing A & O Policy	Annual Plan: Grievance Procedures				
	Section 8 informal review and hearing procedures check here if included in Section 8 Administrative Plan	Annual Plan: Grievance Procedures				
X	The HUD-approved Capital Fund/Comprehensive Grant Program Annual Statement (HUD 52837) for the active grant year	Annual Plan: Capital Needs				
X	Most recent CIAP Budget/Progress Report (HUD 52825) for any active CIAP grant	Annual Plan: Capital Needs				
X	Most recent, approved 5 Year Action Plan for the Capital Fund/Comprehensive Grant Program, if not included as an attachment (provided at PHA option)	Annual Plan: Capital Needs				
	Approved HOPE VI applications or, if more recent, approved or submitted HOPE VI Revitalization Plans or any other approved proposal for development of public housing	Annual Plan: Capital Needs				
	Approved or submitted applications for demolition and/or disposition of public housing	Annual Plan: Demolition and Disposition				
	Approved or submitted applications for designation of public housing (Designated Housing Plans)	Annual Plan: Designation of Public Housing				
X	Approved or submitted assessments of reasonable revitalization of public housing and approved or submitted conversion plans prepared pursuant to section 202 of the 1996 HUD Appropriations Act *Voluntary Conversion Analysis	Annual Plan: Conversion of Public Housing				
	Approved or submitted public housing homeownership programs/plans	Annual Plan: Homeownership				
	Policies governing any Section 8 Homeownership program check here if included in the Section 8 Administrative Plan	Annual Plan: Homeownership				
	Any cooperative agreement between the PHA and the TANF	Annual Plan: Community				

List of Supporting Documents Available for Review							
Applicable & On Display	Supporting Document	Applicable Plan Component					
	agency	Service & Self-Sufficiency					
	FSS Action Plan/s for public housing and/or Section 8	Annual Plan: Community Service & Self-Sufficiency					
X	Most recent self-sufficiency (ED/SS, TOP or ROSS or other resident services grant) grant program reports	Annual Plan: Community Service & Self-Sufficiency					
X	The most recent Public Housing Drug Elimination Program (PHEDEP) semi-annual performance report for any open grant and most recently submitted PHDEP application (PHDEP Plan)	Annual Plan: Safety and Crime Prevention					
X	The most recent fiscal year audit of the PHA conducted under section 5(h)(2) of the U.S. Housing Act of 1937 (42 U. S.C. 1437c(h)), the results of that audit and the PHA's response to any findings	Annual Plan: Annual Audit					
	Troubled PHAs: MOA/Recovery Plan	Troubled PHAs					
	Other supporting documents (optional) (list individually; use as many lines as necessary)	(specify as needed)					

1. Statement of Housing Needs [24 CFR Part 903.7 9 (a)]

A. Housing Needs of Families in the Jurisdiction/s Served by the PHA

Based upon the information contained in the Consolidated Plan/s applicable to the jurisdiction, and/or other data available to the PHA, provide a statement of the housing needs in the jurisdiction by completing the following table. In the "Overall" Needs column, provide the estimated number of renter families that have housing needs. For the remaining characteristics, rate the impact of that factor on the housing needs for each family type, from 1 to 5, with 1 being "no impact" and 5 being "severe impact." Use N/A to indicate that no information is available upon which the PHA can make this assessment.

Housing Needs of Families in the Jurisdiction by Family Type								
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion	
Income <= 30% of AMI	2,056	5	5	N/A	N/A	N/A	N/A	
Income >30% but <=50% of AMI	1,6123	5	5	N/A	N/A	N/A	N/A	
Income >50% but <80% of AMI	2,020	4	4	N/A	N/A	N/A	N/A	
Elderly	1,349	5	5	N/A	N/A	N/A	N/A	
Families with Disabilities	N/A	N/A	N/A	N/A	N/A	N/A	N/A	
Race/Ethnicity	2,979	5	5	N/A	N/A	N/A	N/A	

Housing Needs of Families in the Jurisdiction								
	by Family Type							
Family Type	Overall	Afford- ability	Supply	Quality	Access- ibility	Size	Loca- tion	
European/American								
Race/Ethnicity African American	2,224	5	5	N/A	N/A	N/A	N/A	
Race/Ethnicity Hispanic	434	5	5	N/A	N/A	N/A	N/A	
Race/Ethnicity								

What sources of information did the PHA use to conduct this analysis? (Check all that apply; all materials must be made available for public inspection.)
Consolidated Plan of the Jurisdiction/s Indicate year:
U.S. Census data: the Comprehensive Housing Affordability Strategy
("CHAS") dataset 1990 CHAS Data Book 10/14/01
American Housing Survey data
Indicate year:
Other housing market study
Indicate year:
Other sources: (list and indicate year of information) Market Study for the Fort
Myers Housing Authority, December, 1999, by National Facility Consultants,
Inc., on file at the main office of the FMHA.
B. Housing Needs of Families on the Public Housing and Section 8
Tenant- Based Assistance Waiting Lists
C.
State the housing needs of the families on the PHA's waiting list/s. Complete one table for each type
of PHA-wide waiting list administered by the PHA. PHAs may provide separate tables for site-
based or sub-jurisdictional public housing waiting lists at their option.

	Housing Needs of Families on the Waiting List					
Waiti	Waiting list type: (select one)					
	Section 8 tenant-based assistance					
\boxtimes	Public Housing					
	Combined Section 8 and Public Housing					
	Public Housing Site-Based or sub-jurisdictional waiting list (optional)					
	If used, identify which development/subjurisdiction:					
		# of families	% of total families	Annual Turnover		

Housing Needs of Families on the Waiting List				
Waiting list total	303		234	
Extremely low	256	84%		
income <=30% AMI				
Very low income	37	12.5%		
(>30% but <=50%				
AMI)				
Low income	10	3.5%		
(>50% but <80%				
AMI)				
Families with	166	55%		
children				
Elderly families	44	15%		
Families with	30	10%		
Disabilities				
Race/ethnicity	139	46%		
European/American				
Race/ethnicity	164	54%		
African American				
Race/ethnicity				
Race/ethnicity				
Characteristics by				
Bedroom Size (Public				
Housing Only)				
1BR	137	46%	88	
2 BR	89	29%	44	
3 BR	53	18%	54	
4 BR	13	4%	27	
5 BR	10	3%	13	
5+ BR	1	-	8	
Is the waiting list closed (select one)? No Yes				
If yes:				
How long has it been closed (# of months)?				
Does the PHA expect to reopen the list in the PHA Plan year? No Yes				
Does the PHA permit specific categories of families onto the waiting list, even if				
generally close	ed? No Yes			

C. Strategy for Addressing Needs

Provide a brief description of the PHA's strategy for addressing the housing needs of families in the jurisdiction and on the waiting list **IN THE UPCOMING YEAR**, and the Agency's reasons for choosing this strategy.

(1) Strategies

Need: Shortage of affordable housing for all eligible populations

Strategy 1. Maximize the number of affordable units available to the PHA within its current resources by:

Select al	l that apply
	Employ effective maintenance and management policies to minimize the
\square	number of public housing units off-line
Ä	Reduce turnover time for vacated public housing units
H	Reduce time to renovate public housing units Sock replacement of public housing units lost to the inventory through mixed
	Seek replacement of public housing units lost to the inventory through mixed finance development
	Seek replacement of public housing units lost to the inventory through section 8 replacement housing resources
	Maintain or increase section 8 lease-up rates by establishing payment standards that will enable families to rent throughout the jurisdiction
	Undertake measures to ensure access to affordable housing among families assisted by the PHA, regardless of unit size required
	Maintain or increase section 8 lease-up rates by marketing the program to owners, particularly those outside of areas of minority and poverty concentration
	Maintain or increase section 8 lease-up rates by effectively screening Section 8 applicants to increase owner acceptance of program
\bowtie	Participate in the Consolidated Plan development process to ensure
	coordination with broader community strategies
	Other (list below)
	gy 2: Increase the number of affordable housing units by:
Select al	l that apply
	A 1 C 112 1 2 0 2 1 114 1 1 114
	Apply for additional section 8 units should they become available
	Leverage affordable housing resources in the community through the creation of mixed - finance housing
\bowtie	Pursue housing resources other than public housing or Section 8 tenant-based
	assistance.
	Other: (list below)
Need:	Specific Family Types: Families at or below 30% of median
	gy 1: Target available assistance to families at or below 30 % of AMI
Select al	l that apply

	Exceed HUD federal targeting requirements for families at or below 30% of AMI in public housing Exceed HUD federal targeting requirements for families at or below 30% of AMI in tenant-based section 8 assistance Employ admissions preferences aimed at families with economic hardships Adopt rent policies to support and encourage work Other: (list below)
Need:	Specific Family Types: Families at or below 50% of median
	gy 1: Target available assistance to families at or below 50% of AMI
	Employ admissions preferences aimed at families who are working Adopt rent policies to support and encourage work Other: (list below)
Need:	Specific Family Types: The Elderly
	gy 1: Target available assistance to the elderly:
	Seek designation of public housing for the elderly Apply for special-purpose vouchers targeted to the elderly, should they become available Other: (list below)
Need:	Specific Family Types: Families with Disabilities
	gy 1: Target available assistance to Families with Disabilities:
	Seek designation of public housing for families with disabilities Carry out the modifications needed in public housing based on the section 504 Needs Assessment for Public Housing Apply for special-purpose vouchers targeted to families with disabilities, should they become available Affirmatively market to local non-profit agencies that assist families with disabilities Other: (list below)
Need: needs	Specific Family Types: Races or ethnicities with disproportionate housing

Strategy 1: Increase awareness of PHA resources among families of races and ethnicities with disproportionate needs: Select if applicable Affirmatively market to races/ethnicities shown to have disproportionate housing needs Other: (list below) Strategy 2: Conduct activities to affirmatively further fair housing Select all that apply Counsel section 8 tenants as to location of units outside of areas of poverty or minority concentration and assist them to locate those units Market the section 8 program to owners outside of areas of poverty /minority concentrations Other: (list below) Other Housing Needs & Strategies: (list needs and strategies below) (2) Reasons for Selecting Strategies Of the factors listed below, select all that influenced the PHA's selection of the strategies it will pursue: Funding constraints Staffing constraints Limited availability of sites for assisted housing Extent to which particular housing needs are met by other organizations in the community Evidence of housing needs as demonstrated in the Consolidated Plan and other information available to the PHA Influence of the housing market on PHA programs Community priorities regarding housing assistance Results of consultation with local or state government Results of consultation with residents and the Resident Advisory Board Results of consultation with advocacy groups Other: (list below)

2. Statement of Financial Resources

[24 CFR Part 903.7 9 (b)]

List the financial resources that are anticipated to be available to the PHA for the support of Federal public housing and tenant-based Section 8 assistance programs administered by the PHA during the Plan

year. Note: the table assumes that Federal public housing or tenant based Section 8 assistance grant funds are expended on eligible purposes; therefore, uses of these funds need not be stated. For other funds, indicate the use for those funds as one of the following categories: public housing operations, public housing capital improvements, public housing safety/security, public housing supportive services, Section 8 tenant-based assistance, Section 8 supportive services or other.

Financial Resources: Planned Sources and Uses				
Sources	Planned \$	Planned Uses		
1. Federal Grants (FY 2000 grants)				
a) Public Housing Operating Fund	2,246,263			
b) Public Housing Capital Fund	1,927,417			
c) HOPE VI Revitalization	0			
d) HOPE VI Demolition	0			
e) Annual Contributions for Section 8 Tenant-Based Assistance	0			
f) Public Housing Drug Elimination Program (including any Technical Assistance funds)	213,782			
g) Resident Opportunity and Self- Sufficiency Grants	0			
h) Community Development Block Grant	0			
i) HOME	0			
Other Federal Grants (list below)				
*Elderly Service Coordinator	42,600			
2. Prior Year Federal Grants (unobligated funds only) (list below)				
3. Public Housing Dwelling Rental Income	1,110,964			
4. Other income (list below)				
4. Non-federal sources (list below)				
Total resources	5,430,202			

Financial Resources:				
	l Sources and Uses			
Sources	Planned \$	Planned Uses		
3. PHA Policies Governing Elig [24 CFR Part 903.7 9 (c)]	gibility, Selection, and	d Admissions		
A. Public Housing				
Exemptions: PHAs that do not administer publ 3A.	ic housing are not required to c	omplete subcomponent		
(1) Eligibility				
a. When does the PHA verify eligibility that apply)	for admission to public h	ousing? (select all		
When families are within a certain number)	ain number of being offere	ed a unit: (state		
When families are within a certa Other: (describe) At the time of	•	unit: (state time)		
b. Which non-income (screening) factor admission to public housing (select a Criminal or Drug-related activity Rental history Housekeeping Other (describe)	all that apply)?	ablish eligibility for		
c. Yes No: Does the PHA requenter of the phase of the pha	nest criminal records from encies for screening purpo			
d. Yes No: Does the PHA requ		State law		
e. Xes No: Does the PHA acc	ess FBI criminal records for ses? (either directly or three direct	rom the FBI for		
(2)Waiting List Organization				
a. Which methods does the PHA plan to (select all that apply) Community-wide list	o use to organize its public	c housing waiting list		
Sub-jurisdictional lists Site-based waiting lists				

Other (describe)
 b. Where may interested persons apply for admission to public housing? PHA main administrative office PHA development site management office Other (list below)
c. If the PHA plans to operate one or more site-based waiting lists in the coming year, answer each of the following questions; if not, skip to subsection (3) Assignment
1. How many site-based waiting lists will the PHA operate in the coming year?
2. Yes No: Are any or all of the PHA's site-based waiting lists new for the upcoming year (that is, they are not part of a previously-HUD-approved site based waiting list plan)? If yes, how many lists?
3. Yes No: May families be on more than one list simultaneously If yes, how many lists?
 4. Where can interested persons obtain more information about and sign up to be on the site-based waiting lists (select all that apply)? PHA main administrative office All PHA development management offices Management offices at developments with site-based waiting lists At the development to which they would like to apply Other (list below)
(3) Assignment
 a. How many vacant unit choices are applicants ordinarily given before they fall to the bottom of or are removed from the waiting list? (select one) One Two Three or More
b. Xes No: Is this policy consistent across all waiting list types?
c. If answer to b is no, list variations for any other than the primary public housing waiting list/s for the PHA:
(4) Admissions Preferences

a. Income targeting: ☐ Yes ☐ No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 40% of all new admissions to public housing to families at or below 30% of median area income?
b. Transfer policies: In what circumstances will transfers take precedence over new admissions? (list below) Emergencies Overhoused Underhoused Medical justification Administrative reasons determined by the PHA (e.g., to permit modernization work) Resident choice: (state circumstances below) Other: (list below) The FMHA ha a policy on transfers
c. Preferences 1. Yes No: Has the PHA established preferences for admission to public housing (other than date and time of application)? (If "no" is selected, skip to subsection (5) Occupancy
2. Which of the following admission preferences does the PHA plan to employ in the coming year? (select all that apply from either former Federal preferences or other preferences)
Former Federal preferences: Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition) Victims of domestic violence Substandard housing Homelessness High rent burden (rent is > 50 percent of income)
Other preferences: (select below) Working families and those unable to work because of age or disability Veterans and veterans' families Residents who live and/or work in the jurisdiction Those enrolled currently in educational, training, or upward mobility programs Households that contribute to meeting income goals (broad range of incomes) Households that contribute to meeting income requirements (targeting)

Those previously enrolled in educational, training, or upward mobility
programs Victims of reprisals or hate crimes Other preference(s) (list below)
3. If the PHA will employ admissions preferences, please prioritize by placing a "1" in the space that represents your first priority, a "2" in the box representing your second priority, and so on. If you give equal weight to one or more of these choices (either through an absolute hierarchy or through a point system), place the same number next to each. That means you can use "1" more than once, "2" more than once, etc.
1 Date and Time 2 Working Families
2 Working Families3 Victims of Domestic Violence
Former Federal preferences:
Other preferences (select all that apply) Working families and those unable to work because of age or disability Veterans and veterans' families Residents who live and/or work in the jurisdiction Those enrolled currently in educational, training, or upward mobility programs Households that contribute to meeting income goals (broad range of incomes) Households that contribute to meeting income requirements (targeting) Those previously enrolled in educational, training, or upward mobility programs Victims of reprisals or hate crimes Other preference(s) (list below)
 4. Relationship of preferences to income targeting requirements: The PHA applies preferences within income tiers Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements
(5) Occupancy

Any tim	ne family com ly request for	nation and lease renewal position changes revision			
(6) Deconcentr	ŕ	come Mixing			
a. ⊠ Yes □		the PHA have any general occ	1 3 ()		
public housing developments covered by the deconcentration rule? If no, this section is complete.					
		, continue to the next question			
b. ⊠ Yes □		ny of these covered developme	•		
		nes above or below 85% to 11	_		
		nes of all such developments? nplete. If yes, list these develo			
	15 001	inplete. If yes, list these devel	opinents as follows.		
Deconcentrat	tion Policy	for Covered Developments			
Development	Number	n Policy for Covered Developmen Explanation (if any) (See Step 4	Deconcentration Policy (if		
Name:	of Units	at '903.2 (c) (1) (iv))	no explanation) (see Step 5 at '903.2 (c) (1) (v))		
Southward	189	See Below (117% of	See Below		

FMHA INCOME DECONCENTRATION ANALYSIS

average)

average)

Families

Families

95

Village

Court

Palmetto

See Below (79% below

See Below

	Total	Total		Percent of	
	Income	Households	Averages	Average	Variance
MICHIGAN	\$2,157,763	326	\$6,619	97%	3%
SOUTHWARD	\$1,510,870	189	\$7,994	117%	17%
PALMETTO	\$513,273	95	\$5,403	79%	21%
TOTALS	\$4,181,906	610	\$6,856	100%	N/A

COMPARISON OF HOUSEHOLDS TO OVERALL FMHA

	/ V LI V IOL			
	# Below	% Below	# Above	% Above
	Average	Average	Average	Average
MICHIGAN	201	61.7%	125	38.3%
SOUTHWARD	103	54.5%	86	45.5%
PALMETTO	59	62.1%	36	37.9%

SEGMENTED INCOME DISTRIBUTION BY

	PERCENT					
	\$0	\$1 -	\$5,001 -	\$10,001 -	\$15,001 -	\$20,001
		\$5,000	\$10,000	\$15,000	\$20,000	\$25,000
MICHIGAN	26.4%	22.1%	24.8%	14.1%	8.9%	2.1%
SOUTHWARD	18.0%	12.2%	38.1%	16.4%	10.6%	2.1%
PALMETTO	34.7%	16.8%	29.5%	9.5%	7.4%	1.1%

OBSERVATIONS

- 1) The average household income for all PHA developments with children is \$6.856
- 2) Michigan and Palmetto are under this average and Southward is above the average
- 3) When segmented into income ranges, there is little difference between the three developments in the ranges above \$10,001.
- 4) The major differences between the three developments lie in two income segments:
 - A) \$0 income, where Southward is less that the other two developments, and
 - B) \$5,001 to \$10,000, where Southward is greater.
- 5) The small variations in income between the overall average and the individual averages of

The three developments is not significant, We expect to continue to see minor

variations between these three developments because of the following:

- A) All new tenants are drawn from a single list.. A run of higher or lower Income families filling vacancies at any one of these three developments may temporarily skew these averages to a small degree.
- B) Existing incomes are variable. They may increase or decrease during a period. These alterations are usually not evenly spread, and may Effect families in any development disproportionately.

October 2001

a. 🗌	Yes No: Did the PHA's analysis of its family (general occupancy) developments to determine concentrations of poverty indicate the need for measures to promote deconcentration of poverty or income mixing?
b. 🗌	Yes No: Did the PHA adopt any changes to its admissions policies based on the results of the required analysis of the need to promote deconcentration of poverty or to assure income mixing?
c. If th	he answer to b was yes, what changes were adopted? (select all that apply) Adoption of site based waiting lists If selected, list targeted developments below:
	Employing waiting list "skipping" to achieve deconcentration of poverty or income mixing goals at targeted developments If selected, list targeted developments below:
	Employing new admission preferences at targeted developments If selected, list targeted developments below:
	Other (list policies and developments targeted below)
d. 🗌	Yes No: Did the PHA adopt any changes to other policies based on the results of the required analysis of the need for deconcentration of poverty and income mixing?
e. If the app	he answer to d was yes, how would you describe these changes? (select all that bly)

Additional affirmative marketing Actions to improve the marketability of certain developments Adoption or adjustment of ceiling rents for certain developments Adoption of rent incentives to encourage deconcentration of poverty and income-mixing Other (list below)
f. Based on the results of the required analysis, in which developments will the PHA make special efforts to attract or retain higher-income families? (select all that apply) Not applicable: results of analysis did not indicate a need for such efforts List (any applicable) developments below:
g. Based on the results of the required analysis, in which developments will the PHA make special efforts to assure access for lower-income families? (select all that apply) Not applicable: results of analysis did not indicate a need for such efforts List (any applicable) developments below:
B. Section 8
Exemptions: PHAs that do not administer section 8 are not required to complete sub-component 3B. Unless otherwise specified, all questions in this section apply only to the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).
(1) Eligibility
 a. What is the extent of screening conducted by the PHA? (select all that apply) Criminal or drug-related activity only to the extent required by law or regulation Criminal and drug-related activity, more extensively than required by law or regulation
More general screening than criminal and drug-related activity (list factors below)Other (list below)
b. Yes No: Does the PHA request criminal records from local law enforcement agencies for screening purposes?
c. Yes No: Does the PHA request criminal records from State law enforcement agencies for screening purposes?

d. Yes No: Does the PHA access FBI criminal records from the FBI for screening purposes? (either directly or through an NCIC-authorized source)
 e. Indicate what kinds of information you share with prospective landlords? (select all that apply) Criminal or drug-related activity Other (describe below)
(2) Waiting List Organization
 a. With which of the following program waiting lists is the section 8 tenant-based assistance waiting list merged? (select all that apply) None Federal public housing Federal moderate rehabilitation Federal project-based certificate program Other federal or local program (list below)
 b. Where may interested persons apply for admission to section 8 tenant-based assistance? (select all that apply) PHA main administrative office Other (list below)
(3) Search Time
a. Yes No: Does the PHA give extensions on standard 60-day period to search for a unit?
If yes, state circumstances below:
(4) Admissions Preferences
a. Income targeting
Yes No: Does the PHA plan to exceed the federal targeting requirements by targeting more than 75% of all new admissions to the section 8 program to families at or below 30% of median area income? b. Preferences
1. Yes No: Has the PHA established preferences for admission to section 8 tenant-based assistance? (other than date and time of

application) (if no, skip to subcomponent (5) Special purpose section 8 assistance programs)

coı	nich of the following admission preferences does the PHA plan to employ in the ming year? (select all that apply from either former Federal preferences or other eferences)
Forme	r Federal preferences Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition) Victims of domestic violence Substandard housing Homelessness High rent burden (rent is > 50 percent of income)
Other j	Preferences (select all that apply) Working families and those unable to work because of age or disability Veterans and veterans' families Residents who live and/or work in your jurisdiction Those enrolled currently in educational, training, or upward mobility programs Households that contribute to meeting income goals (broad range of incomes) Households that contribute to meeting income requirements (targeting) Those previously enrolled in educational, training, or upward mobility programs Victims of reprisals or hate crimes Other preference(s) (list below)
the seco cho sam	the PHA will employ admissions preferences, please prioritize by placing a "1" in space that represents your first priority, a "2" in the box representing your and priority, and so on. If you give equal weight to one or more of these ices (either through an absolute hierarchy or through a point system), place the number next to each. That means you can use "1" more than once, "2" more in once, etc.
Forme	Date and Time r Federal preferences Involuntary Displacement (Disaster, Government Action, Action of Housing Owner, Inaccessibility, Property Disposition) Victims of domestic violence Substandard housing Homelessness High rent burden

Other preferences (select all that apply)
Working families and those unable to work because of age or disability
Veterans and veterans' families
Residents who live and/or work in your jurisdiction
Those enrolled currently in educational, training, or upward mobility programs Households that contribute to meeting income goals (broad range of incomes) Households that contribute to meeting income requirements (targeting) Those previously enrolled in educational, training, or upward mobility programs
Victims of reprisals or hate crimes
Other preference(s) (list below)
4. Among applicants on the waiting list with equal preference status, how are applicants selected? (select one) Date and time of application
Drawing (lottery) or other random choice technique
5. If the PHA plans to employ preferences for "residents who live and/or work in the jurisdiction" (select one) This preference has previously been reviewed and approved by HUD The PHA requests approval for this preference through this PHA Plan
6. Relationship of preferences to income targeting requirements: (select one) The PHA applies preferences within income tiers Not applicable: the pool of applicant families ensures that the PHA will meet income targeting requirements
(5) Special Purpose Section 8 Assistance Programs
a. In which documents or other reference materials are the policies governing eligibility, selection, and admissions to any special-purpose section 8 program administered by the PHA contained? (select all that apply) The Section 8 Administrative Plan Briefing sessions and written materials Other (list below)
b. How does the PHA announce the availability of any special-purpose section 8 programs to the public? Through published notices Other (list below)

4. PHA Rent Determination Policies [24 CFR Part 903.7 9 (d)]

A	T		TT	•
Α.	Piil	ามา	$H \cap$	using
7 3 •	ı u,		110	usiii <u>S</u>

Exemptions: PHAs that do not administer public housing are not required to complete sub-component

(1) Income Based Rent Policies

Describe the PHA's income based rent setting policy/ies for public housing using, including discretionary (that is, not required by statute or regulation) income disregards and exclusions, in the appropriate spaces below.

a. Use	of discretionary policies: (select one)
	The PHA will not employ any discretionary rent-setting policies for income based rent in public housing. Income-based rents are set at the higher of 30% of adjusted monthly income, 10% of unadjusted monthly income, the welfare rent, or minimum rent (less HUD mandatory deductions and exclusions). (If selected, skip to sub-component (2))
or	
	The PHA employs discretionary policies for determining income based rent (If selected, continue to question b.)
b. Mir	nimum Rent
1. Wha	t amount best reflects the PHA's minimum rent? (select one) \$0 \$1-\$25 \$26-\$50
2.	Yes No: Has the PHA adopted any discretionary minimum rent hardship exemption policies?
3. If ye	s to question 2, list these policies below:
c. Rei	nts set at less than 30% than adjusted income
1.	Yes No: Does the PHA plan to charge rents at a fixed amount or percentage less than 30% of adjusted income?

۷.	under which these will be used below:
d.	Which of the discretionary (optional) deductions and/or exclusions policies does the PHA plan to employ (select all that apply) For the earned income of a previously unemployed household member For increases in earned income Fixed amount (other than general rent-setting policy) If yes, state amount/s and circumstances below:
	Fixed percentage (other than general rent-setting policy) If yes, state percentage/s and circumstances below:
	For household heads For other family members For transportation expenses For the non-reimbursed medical expenses of non-disabled or non-elderly families Other (describe below)
e.	Ceiling rents
1.	Do you have ceiling rents? (rents set at a level lower than 30% of adjusted income) (select one)
	Yes for all developments Yes but only for some developments No
2.	For which kinds of developments are ceiling rents in place? (select all that apply)
	For all developments For all general occupancy developments (not elderly or disabled or elderly only) For specified general occupancy developments For certain parts of developments; e.g., the high-rise portion For certain size units; e.g., larger bedroom sizes Other (list below)
3.	Select the space or spaces that best describe how you arrive at ceiling rents (select all that apply)

Market comparability study Fair market rents (FMR) 95 th percentile rents 75 percent of operating costs 100 percent of operating costs for general occupancy (family) developments Operating costs plus debt service The "rental value" of the unit Other (list below)
f. Rent re-determinations:
 Between income reexaminations, how often must tenants report changes in income or family composition to the PHA such that the changes result in an adjustment to rent? (select all that apply) Never At family option Any time the family experiences an income increase Any time a family experiences an income increase above a threshold amount or percentage: (if selected, specify threshold) Other (list below)
g. \(\sum \) Yes \(\sum \) No: Does the PHA plan to implement individual savings accounts for residents (ISAs) as an alternative to the required 12 month disallowance of earned income and phasing in of rent increases in the next year? (2) Flat Rents
 In setting the market-based flat rents, what sources of information did the PHA use to establish comparability? (select all that apply.) The section 8 rent reasonableness study of comparable housing Survey of rents listed in local newspaper Survey of similar unassisted units in the neighborhood Other (list/describe below) Market Study and Rent Analysis
B. Section 8 Tenant-Based Assistance Exemptions: PHAs that do not administer Section 8 tenant-based assistance are not required to complete sub-component 4B. Unless otherwise specified, all questions in this section apply only to
the tenant-based section 8 assistance program (vouchers, and until completely merged into the voucher program, certificates).

(1) Payment Standards

Describe the voucher payment standards and policies.
a. What is the PHA's payment standard? (select the category that best describes your standard)
At or above 90% but below100% of FMR 100% of FMR
Above 100% but at or below 110% of FMR Above 110% of FMR (if HUD approved; describe circumstances below)
b. If the payment standard is lower than FMR, why has the PHA selected this standard? (select all that apply)
FMRs are adequate to ensure success among assisted families in the PHA's segment of the FMR area
The PHA has chosen to serve additional families by lowering the payment standard
Reflects market or submarket Other (list below)
c. If the payment standard is higher than FMR, why has the PHA chosen this level? (select all that apply)
FMRs are not adequate to ensure success among assisted families in the PHA's segment of the FMR area
Reflects market or submarket
☐ To increase housing options for families ☐ Other (list below)
d. How often are payment standards reevaluated for adequacy? (select one)Annually
Other (list below)
e. What factors will the PHA consider in its assessment of the adequacy of its paymentstandard? (select all that apply)
Success rates of assisted families
Rent burdens of assisted families Other (list below)
(2) Minimum Rent
a. What amount best reflects the PHA's minimum rent? (select one)
\$1-\$25
\$26-\$50

	ne PHA adopted any discre nption policies? (if yes, li	tionary minimum rent hards st below)	hip	
5. Operations and Management [24 CFR Part 903.7 9 (e)]				
	5: High performing and small P must complete parts A, B, and C	HAs are not required to complete (2(2))	this	
A. PHA Management S				
Describe the PHA's management	ent structure and organization.			
 (select one) An organization chart showing the PHA's management structure and organization is attached. A brief description of the management structure and organization of the PHA follows: The FMHA is governed by a 7 member board appointed by the City Mayor. The Board hires an executive director who manages the authority's day to day operations. B. HUD Programs Under PHA Management 				
List Federal programs adn	ninistered by the PHA, number of expected turnover in each. (Use	of families served at the beginning e "NA" to indicate that the PHA do		
Program Name	Units or Families	Expected		
S	Served at Year	Turnover		
	Beginning			
Public Housing	960	200		
Section 8 Vouchers				
Section 8 Certificates				
Section 8 Mod Rehab				

110gram Name	Served at Year Beginning	Turnover
Public Housing	960	200
Section 8 Vouchers		
Section 8 Certificates		
Section 8 Mod Rehab		
Special Purpose Section		
8 Certificates/Vouchers		
(list individually)		
Public Housing Drug	960	200
Elimination Program		
(PHDEP)		
Other Federal		
Programs(list		
individually)		

Capital Fund	960	200

C. Management and Maintenance Policies

List the PHA's public housing management and maintenance policy documents, manuals and handbooks that contain the Agency's rules, standards, and policies that govern maintenance and management of public housing, including a description of any measures necessary for the prevention or eradication of pest infestation (which includes cockroach infestation) and the policies governing Section 8 management.

- (1) Public Housing Maintenance and Management: (list below) **FMHA Policy Manual**
- (2) Section 8 Management: (list below) N/A

6. PHA Grievance Procedures

[24 CFR Part 903.7 9 (f)]

	nt 6: High performing PHAs are not required to complete component 6. exempt from sub-component 6A.
	as the PHA established any written grievance procedures in addition to federal requirements found at 24 CFR Part 966, Subpart B, for residents of public housing?
If yes, list addit	tions to federal requirements below:
initiate the PHA gr	should residents or applicants to public housing contact to rievance process? (select all that apply) ministrative office ment management offices (w)
	Based Assistance as the PHA established informal review procedures for applicants to the Section 8 tenant-based assistance program and informal hearing procedures for families assisted by the Section 8 tenant-based assistance program in addition to federal requirements found at 24 CFR 982?

If yes, list additions to federal requirements below:

 2. Which PHA office should applicants or assisted families contact to initiate the informal review and informal hearing processes? (select all that apply) PHA main administrative office Other (list below) 		
7. Capital Improvement Needs [24 CFR Part 903.7 9 (g)] Exemptions from Component 7: Section 8 only PHAs are not required to complete this component and		
may skip to Component 8.		
A. Capital Fund Activities Exemptions from sub-component 7A: PHAs that will not participate in the Capital Fund Program may		
skip to component 7B. All other PHAs must complete 7A as instructed.		
(1) Capital Fund Program Annual Statement		
Using parts I, II, and III of the Annual Statement for the Capital Fund Program (CFP), identify capital activities the PHA is proposing for the upcoming year to ensure long-term physical and social viability of its public housing developments. This statement can be completed by using the CFP Annual Statement tables provided in the table library at the end of the PHA Plan template OR , at the PHA's option, by completing and attaching a properly updated HUD-52837.		
Select one:		
The Capital Fund Program Annual Statement is provided as an attachment to the PHA Plan at Attachment (state name) fl047a02.xls		
-or-		
The Capital Fund Program Annual Statement is provided below: (if selected, copy the CFP Annual Statement from the Table Library and insert here)		
(2) Optional 5-Year Action Plan		
Agencies are encouraged to include a 5-Year Action Plan covering capital work items. This statement can be completed by using the 5 Year Action Plan table provided in the table library at the end of the PHA Plan template OR by completing and attaching a properly updated HUD-52834.		
a. X Yes No: Is the PHA providing an optional 5-Year Action Plan for the Capital Fund? (if no, skip to sub-component 7B)		
 b. If yes to question a, select one: The Capital Fund Program 5-Year Action Plan is provided as an attachment to the PHA Plan at Attachment (state namefl047b02.xls -or- 		

	The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)
a. 🔀	Yes No: Is the PHA providing an P & E Report for the Capital Fund for reporting period 12/31/2002? (if no, skip to subcomponent 7B) fl047c02.xls
b. If y ⊠ -or-	res to question a, select one: The Capital Fund Program P & E Report is provided as an attachment to the PHA Plan at Attachment (state namefl047c02.xls and P & E report for FY2001 fl047.d02.xls
	The Capital Fund Program 5-Year Action Plan is provided below: (if selected, copy the CFP optional 5 Year Action Plan from the Table Library and insert here)
	OPE VI and Public Housing Development and Replacement ities (Non-Capital Fund)
HOPE Y	bility of sub-component 7B: All PHAs administering public housing. Identify any approved VI and/or public housing development or replacement activities not described in the Capital Fund n Annual Statement.
	es No: a) Has the PHA received a HOPE VI revitalization grant? (if no, skip to question c; if yes, provide responses to question b for each grant, copying and completing as many times as necessary) b) Status of HOPE VI revitalization grant (complete one set of questions for each grant)
	1. Development name:
	2. Development (project) number: 3. Status of grant: (select the statement that best describes the current
	3. Status of grant: (select the statement that best describes the current status)
	Revitalization Plan under development Revitalization Plan submitted, pending approval Revitalization Plan approved Activities pursuant to an approved Revitalization Plan underway
☐ Y€	es No: c) Does the PHA plan to apply for a HOPE VI Revitalization grant in the Plan year? If yes, list development name/s below:

Yes No:	d) Will the PHA be engaging in any mixed-finance development activities for public housing in the Plan year? If yes, list developments or activities below:		
☐ Yes ⊠ No:	e) Will the PHA be conducting any other public housing development or replacement activities not discussed in the Capital Fund Program Annual Statement? If yes, list developments or activities below:		
8. Demolition a	and Disposition		
[24 CFR Part 903.7 9 (h)]		
Applicability of compo	nent 8: Section 8 only PHAs are not required to complete this section.		
1. Yes No:	Does the PHA plan to conduct any demolition or disposition activities (pursuant to section 18 of the U.S. Housing Act of 1937 (42 U.S.C. 1437p)) in the plan Fiscal Year? (If "No", skip to component 9; if "yes", complete one activity description for each development.)		
2. Activity Descript	tion		
Yes No:	Has the PHA provided the activities description information in the optional Public Housing Asset Management Table? (If "yes", skip to component 9. If "No", complete the Activity Description table below.)		
	Demolition/Disposition Activity Description		
1a. Development na			
1b. Development (p	project) number:		
2. Activity type: D			
•	position		
3. Application statu Approved [is (select one)		
Submitted, pending approval			
Planned application			
	approved, submitted, or planned for submission: (DD/MM/YY)		
5. Number of units	affected:		
6. Coverage of acti	,		
Part of the development			
Total developm			
7. Timeline for act	ivity: projected start date of activity:		
a. Actual ()1	DIVICUICU SIAIT UAIC UI ACTIVITY.		

_	f Public Housing for Occupancy by Elderly Families	
or Families Wi	ith Disabilities or Elderly Families and Families with	
[24 CFR Part 903.7 9 (i)]		
	nent 9; Section 8 only PHAs are not required to complete this section.	
1. ☐ Yes ⊠ No:	Has the PHA designated or applied for approval to designate or does the PHA plan to apply to designate any public housing for occupancy only by the elderly families or only by families with disabilities, or by elderly families and families with disabilities or will apply for designation for occupancy by only elderly families or only families with disabilities, or by elderly families and families with disabilities as provided by section 7 of the U.S. Housing Act of 1937 (42 U.S.C. 1437e) in the upcoming fiscal year? (If "No", skip to component 10. If "yes", complete one activity description for each development, unless the PHA is eligible to complete a streamlined submission; PHAs completing streamlined submissions may skip to component 10.)	
2. Activity Descripti	on	
Yes No:	Has the PHA provided all required activity description information for this component in the optional Public Housing Asset Management Table? If "yes", skip to component 10. If "No", complete the Activity Description table below.	
Des	signation of Public Housing Activity Description	
1a. Development nan 1b. Development (pro		
2. Designation type:		
Occupancy by	only the elderly	
Occupancy by	families with disabilities	
Occupancy by	only elderly families and families with disabilities	
3. Application status	` _	
Approved; included in the PHA's Designation Plan		
Submitted, pending approval		
Planned appli		
	ion approved, submitted, or planned for submission: (DD/MM/YY)	
3. II approved, Will t	his designation constitute a (select one)	

b. Projected end date of activity:

New Designation Plan			
	Revision of a previously-approved Designation Plan?		
6. Number of units a			
7. Coverage of action			
Part of the develo	•		
Total developme	nt		
10 Conversion of	f Public Housing to Tenant-Based Assistance		
[24 CFR Part 903.7 9 (j)]	11 ubite Housing to Tenant-Dascu Assistance		
	nent 10; Section 8 only PHAs are not required to complete this section.		
1	, , , , , , , , , , , , , , , , , , , ,		
	Reasonable Revitalization Pursuant to section 202 of the HUD D Appropriations Act		
1. \square Yes \boxtimes No:	Have any of the PHA's developments or portions of		
	developments been identified by HUD or the PHA as covered		
	under section 202 of the HUD FY 1996 HUD Appropriations		
	Act? (If "No", skip to component 11; if "yes", complete one		
	activity description for each identified development, unless		
	eligible to complete a streamlined submission. PHAs		
	completing streamlined submissions may skip to component		
	11.)		
2. Activity Description	on		
Yes No:	Has the PHA provided all required activity description		
	information for this component in the optional Public Housing		
	Asset Management Table? If "yes", skip to component 11. If		
	"No", complete the Activity Description table below.		
	, I		
Conversion of Public Housing Activity Description			
1a. Development nan	ne:		
1b. Development (pro	oject) number:		
2. What is the status of the required assessment?			
Assessment underway			
Assessment results submitted to HUD			
Assessment results approved by HUD (if marked, proceed to next			
question)			
Other (explain below)			
outer (explain outer)			
3. Yes No: Is a Conversion Plan required? (If yes, go to block 4; if no, go to			
block 5.)			
4. Status of Conversion Plan (select the statement that best describes the current			
status)			

Conversion Plan in developmen			
Conversion Plan submitted to HUD on: (DD/MM/YYYY)Conversion Plan approved by HUD on: (DD/MM/YYYY)			
	roved Conversion Plan underway		
Tetrvities parsuant to 11eD app	Toved Conversion I fair underway		
5. Description of how requirements of Sect	ion 202 are being satisfied by means other		
than conversion (select one)	1.1 122 12 27 71 7		
Units addressed in a pending or submitted or approve	approved demolition application (date		
	approved HOPE VI demolition application		
(date submitted or ap			
	approved HOPE VI Revitalization Plan		
(date submitted or ap	proved:) ble: vacancy rates are less than 10 percent		
	ble: site now has less than 300 units		
Other: (describe below)	ore. Site now has less than 500 times		
_			
B. Reserved for Conversions pursuant to 1937	Section 22 of the U.S. Housing Act of		
Voluntary Conversion Initial Assessment			
a. How many of the PHA's developments	are subject to the Required Initial		
Assessments? 3			
b. How many of the PHA's developments	are not subject to the Required Initial		
•	elderly and/or disabled development not		
general occupancy projects)? 3	1		
c. How many Assessments were conducted for the PHA's covered developments?			
3			
d. Identify PHA developments that may be appropriate for conversion based on the			
Required Initial Assessments:	appropriate for conversion cases on the		
None were identified.			
Development Name	Number of Units		
None	Number of Chits		

e. If the PHA has not completed the Required Initial Assessments, describe the status of these assessments.

The assessments have been completed and are on file at the FMHA main office.

C. Reserved for Conversions pursuant to Section 33 of the U.S. Housing Act of 1937

11. Homeownership Programs Administered by the PHA

[24 CFR Part 903.7 9 (k)]	
A. Public Housing Exemptions from Compo	nent 11A: Section 8 only PHAs are not required to complete 11A.
1. ☐ Yes ☒ No:	Does the PHA administer any homeownership programs administered by the PHA under an approved section 5(h) homeownership program (42 U.S.C. 1437c(h)), or an approved HOPE I program (42 U.S.C. 1437aaa) or has the PHA applied or plan to apply to administer any homeownership programs under section 5(h), the HOPE I program, or section 32 of the U.S. Housing Act of 1937 (42 U.S.C. 1437z-4). (If "No", skip to component 11B; if "yes", complete one activity description for each applicable program/plan, unless eligible to complete a streamlined submission due to small PHA or high performing PHA status. PHAs completing streamlined submissions may skip to component 11B.)
2. Activity Descripti	on
Yes No:	Has the PHA provided all required activity description information for this component in the optional Public Housing Asset Management Table? (If "yes", skip to component 12. If "No", complete the Activity Description table below.)
	lic Housing Homeownership Activity Description Complete one for each development affected)
1a. Development nan	
1b. Development (pro	
2. Federal Program a	,
☐ HOPE I ☐ 5(h) ☐ Turnkey I	
=	2 of the USHA of 1937 (effective 10/1/99)
3. Application status:	

Approved;	included in the PHA's Homeownership Plan/Program				
Submitted, pending approval					
Planned application					
4. Date Homeownership Plan/Program approved, submitted, or planned for submission:					
(DD/MM/YYYY)					
5. Number of units at	ffected:				
6. Coverage of action	n: (select one)				
Part of the develop	oment				
Total developmen	t				
B. Section 8 Tenan	nt Based Assistance				
1. Yes No:	Does the PHA plan to administer a Section 8 Homeownership program pursuant to Section 8(y) of the U.S.H.A. of 1937, as implemented by 24 CFR part 982? (If "No", skip to component 12; if "yes", describe each program using the table below (copy and complete questions for each program identified), unless the PHA is eligible to complete a streamlined submission due to high performer status. High performing PHAs may skip to component 12.)				
2. Program Description	1 /				
Z. Trogram Z cocription					
a. Size of Program					
Yes No:	Will the PHA limit the number of families participating in the section 8 homeownership option?				
If the answer to the question above was yes, which statement best describes the number of participants? (select one) 25 or fewer participants 26 - 50 participants 51 to 100 participants more than 100 participants					
its	the PHA's program have eligibility criteria for participation in Section 8 Homeownership Option program in addition to HUD teria? yes, list criteria below:				

12. PHA Community Service and Self-sufficiency Programs

[24 CFR Part 903.7 9 (1)]

Exemptions from Component 12: High performing and small PHAs are not required to complete this component. Section 8-Only PHAs are not required to complete sub-component C.

A. PHA Coordination with the Welfare (TANF) Agency
 Cooperative agreements: Yes
If yes, what was the date that agreement was signed? <u>DD/MM/YY</u>
 2. Other coordination efforts between the PHA and TANF agency (select all that apply) Client referrals Information sharing regarding mutual clients (for rent determinations and otherwise) Coordinate the provision of specific social and self-sufficiency services and programs to eligible families Jointly administer programs Partner to administer a HUD Welfare-to-Work voucher program Joint administration of other demonstration program Other (describe)
B. Services and programs offered to residents and participants
(1) General
 a. Self-Sufficiency Policies Which, if any of the following discretionary policies will the PHA employ to enhance the economic and social self-sufficiency of assisted families in the following areas? (select all that apply) Public housing rent determination policies Public housing admissions policies Section 8 admissions policies Preference in admission to section 8 for certain public housing families Preferences for families working or engaging in training or education programs for non-housing programs operated or coordinated by the PHA Preference/eligibility for public housing homeownership option participation Preference/eligibility for section 8 homeownership option participation Other policies (list below)
b. Economic and Social self-sufficiency programs

☐ Yes ⊠ No:	Does the PHA coordinate, promote or provide any programs to enhance the economic and social self-sufficiency of residents? (If "yes", complete the following table; if "no" skip to sub-component 2, Family Self Sufficiency Programs. The position of the table may be altered to facilitate its use.)			
Carvings and Programs				

Services and Programs				
Program Name & Description (including location, if appropriate)	Estimated Size	Allocation Method (waiting list/random selection/specific criteria/other)	Access (development office / PHA main office / other provider name)	Eligibility (public housing or section 8 participants or both)

(2) Family Self Sufficiency program/s

a. Participation Description

 \boxtimes

Family Self Sufficiency (FSS) Participation				
Program	Required Number of Participants (start of FY 2000 Estimate)	Actual Number of Participants (As of: DD/MM/YY)		
Public Housing				
Section 8				
b. Tes No: If the PHA is not maintaining the minimum program size required by HUD, does the most recent FSS Action Plan address the steps the PHA plans to take to achieve at least the minimum program size? If no, list steps the PHA will take below:				
C. Welfare Benefit Reductions				
 The PHA is complying with the statutory requirements of section 12(d) of the U.S. Housing Act of 1937 (relating to the treatment of income changes resulting from welfare program requirements) by: (select all that apply) Adopting appropriate changes to the PHA's public housing rent determination 				

Informing residents of new policy on admission and reexamination

policies and train staff to carry out those policies

\boxtimes	Actively notifying residents of new policy at times in addition to admission and
	reexamination.
	Establishing or pursuing a cooperative agreement with all appropriate TANF
	agencies regarding the exchange of information and coordination of services
\boxtimes	Establishing a protocol for exchange of information with all appropriate TANF
	agencies
	Other: (list below)

D. Reserved for Community Service Requirement pursuant to section 12(c) of the U.S. Housing Act of 1937

COMMUNITY SERVICE PROGRAM IMPLEMENTATION

During FY 2001, the Fort Myers Housing Authority undertook the following activities to provide a framework for formal implementation and institutionalization of the basic requirements of the Community Service program:

IN-HOUSE PROGRAM DEVELOPMENT AND STAFF TRAINING

- Assigned J. Walter Streets, director of Community Services, as the staff coordinator to oversee and implement the program
- Developed an outline for staff training, to include Development Managers
- Discussed development of a written agreement with the Welfare Provider to coordinate information
- Developed a timetable for a full Staff Meeting, including all Development Managers, to review and explain the Community Service Program implementation process and the role of staff in the process for August, 2001
- Developed an internal filing system and reporting system so Housing Managers can regularly cross check non-exempt residents and inform staff who coordinate the program
- Included the Community Service Program onto the Agenda as an Agenda Item on all regular monthly Manager meetings so that program information can be shared by staff
- Developed an internal staff methodology to track and verify completion of community service programs by nonexempt residents

DEVELOPMENT OF COMMUNITY SERVICE PROGRAM REQUIREMENTS

- During the past year, held discussions on which non-profits would be included in the program and began to set up meetings with a number of non-profits in the Fort Myers area to discuss and develop appropriate community service activities for the program.
- Worked with the Volunteer Center of Lee County to obtain a listing of Lee County Agencies for residents' volunteer activities, approved by the Senior Friendship Centers of Lee County and the United Way of Lee County.
- Provided informational listings of suggested community service activities and courses and workshops offered to residents to assist them in fulfilling the Community Service Program requirement

LEASE PROVISIONS & ENFORCEMENT PROCEDURES

- Reviewed the current lease in July and August, 2001, re: adding a lease amendment
 which would allow for lease termination due to non-compliance with CS
 requirements, to be reviewed by attorney
- Developed a timetable for amended lease language to be approved by the FMHA Board of Commissioners which would allow for residents and resident associations to submit written comments, and to provide copies available for public review.
- Amended Lease presented in September, 2001 to the Board for approval.
- Developed an amended annual re-certification process in connection with lease renewal date for public housing residents to incorporate an annual evaluation of CS requirements, including 30 day notification to resident for non-compliance

IDENTIFY PROGRAM PARTICIPANTS

- Listed residents from all FMHA developments eligible for the program
- Detailed the listing of non-exempt residents according to lease renewal dates

NOTIFICATION OF THE PROGRAM TO RESIDENTS

 Placed the item on the agenda of Resident Council Meetings for August, 2001, to give residents an opportunity to review the requirements of the Community Service Program under QWHRA and answer their questions

- Drafted an appropriate notification letter to residents to notify them of their responsibilities in this program under QWHRA.
- Notified residents by certified letter.
- Trained staff how to respond to questions from residents.
- Prepared an article on the new Community Service Program for the Newsletter to inform all residents of the program and its requirements for Winter, 2001.
- Drafted and posted in August, 2001, appropriate Public Notices about the Community Service Program to inform all Residents, to be posted throughout the Fort Myers Housing Authority developments.
- Developed a timetable to meet with individual residents to explain community service program requirements in detail and to assist them in enrolling in appropriate programs

TRACK BENEFIT REDUCTIONS

 Developed a process in concert with Welfare Provider to track evidence of actual benefit reduction.

The lease amendment re: resident community service program participation was formally adopted by the Board of Commissioners in September, 2001, and the Community Service Program is fully operational with all non-exempt residents participating and with the requirements being tracked and verified on an on-going basis.

13. PHA Safety and Crime Prevention Measures

[24 CFR Part 903.7 9 (m)]

Exemptions from Component 13: High performing and small PHAs not participating in PHDEP and Section 8 Only PHAs may skip to component 15. High Performing and small PHAs that are participating in PHDEP and are submitting a PHDEP Plan with this PHA Plan may skip to subcomponent D.

A. Need for measures to ensure the safety of public housing residents

cribe the need for measures to ensure the safety of public housing residents ct all that apply)	}
High incidence of violent and/or drug-related crime in some or all of the P developments	'HA's

adjacent to the PHA's developmed Residents fearful for their safety Observed lower-level crime, van People on waiting list unwilling	and/or the safety of their children
2. What information or data did the PH to improve safety of residents (selec	A used to determine the need for PHA actions t all that apply).
public housing authority Analysis of cost trends over time Resident reports PHA employee reports Police reports	idents time for crimes committed "in and around" e for repair of vandalism and removal of graffiti ess with previous or ongoing anticrime/anti
3. Which developments are most affect Michigan Court, Palmetto Cou	
B. Crime and Drug Prevention activi undertake in the next PHA fiscal year	ties the PHA has undertaken or plans to
(select all that apply)	ronmental Design th, adults, or seniors
2. Which developments are most affect All public housing deve	
C. Coordination between PHA and the	he police

1. Describe the coordination between the PHA and the appropriate police precincts for

carrying out crime prevention measures and activities: (select all that apply)

\boxtimes	Police involvement in development, implementation, and/or ongoing
\boxtimes	evaluation of drug-elimination plan Police provide crime data to housing authority staff for analysis and action Police have established a physical presence on housing authority property (e.g., community policing office, officer in residence)
	Police regularly testify in and otherwise support eviction cases
	Police regularly meet with the PHA management and residents
\boxtimes	Agreement between PHA and local law enforcement agency for provision of
	above-baseline law enforcement services
	Other activities (list below)
2. Wh	ich developments are most affected? (list below)
	All developments are affected.
	wo 0.10 p0.100 w. 0.110000 w.
D. Ad	ditional information as required by PHDEP/PHDEP Plan
PHAs el	ligible for FY 2000 PHDEP funds must provide a PHDEP Plan meeting specified requirements receipt of PHDEP funds.
∐ Ye	es No: Is the PHA eligible to participate in the PHDEP in the fiscal year covered by this PHA Plan?
☐ Ye	
☐ Ye	
D/N/A	
14. R	RESERVED FOR PET POLICY
[24 CFR	R Part 903.7 9 (n)]

The FMHA has adopted a pet policy covering all units, elderly and family. The policy (Section 18) is on file at the main office of the housing authority and does not apply to pets that are used to assist persons with disabilities. A summary of the main aspects of the policy are as follows:

- Pets are limited to domesticated dogs, cats, birds and fish in aquariums. The Housing Authority reserves the right to limit size and number. Animals deemed to be potentially harmful to health or safety of others will not be allowed (including attack or fight trained dogs pit bulls). Residents in all units must register pets with the Community Services Bureau by submitting a Pet Registration Form with a photo of the pet. Owners must provide records to the Property Managers that pet is properly inoculated and licensed and also provide name and phone number of individual who will be responsible for the pet in event of resident absence or illness.
- A non-refundable security deposit of \$100 is required for elderly facilities. A non-refundable security deposit of \$250 is required for family developments,

- along with verification of a liability insurance policy covering the pet at time of registering the pet.
- Owners are liable for amount of all damages to FMHA caused by their pet.
 Owners shall be liable for entire amount of injury to person or property of other residents, staff or visitors caused by their pet and shall indemnify FMHA for all cost of litigation and attorney's fees resulting from damage.
- Owners must maintain pets in living quarters in manner to prevent odors and other unsanitary conditions in owner's unit and surrounding areas.
- Complaints regarding pets disturbing neighbors will result in owner having to remove the pet or owner eviction.
- Owners must keep pets in owner's apartment or on leash at all times when outside. No outdoor cages are allowed.
- Pets are allowed only on designated pet areas on the grounds. Owners must clean
 up after their pets and are responsible for disposing of pet waste. Animals are not
 allowed in common rooms or dining rooms and should be carried if possible in
 elevators.
- Pets cannot be left unattended on a lease connected to clotheslines, poles or any object outdoors.
- If work is to be done in a pet owners unit, the owner must either be home or arrange for pet to be contained or removed from the unit.

15. Civil Rights Certifications

[24 CFR Part 903.7 9 (o)]

Civil rights certifications are included in the PHA Plan Certifications of Compliance with the PHA Plans and Related Regulations.

<u>16.</u>	Fi	sca	l A	Lu	ıd	<u>lit</u>
F2.4.C	TTD	D4	002]		(\1

[2	4 (٦F.	KI	art	90	13.7	9	(p)	

1.	Yes 🗌	No:	Is the PHA required to have an audit conducted under section
			5(h)(2) of the U.S. Housing Act of 1937 (42 U S.C. 1437c(h))?
			(If no, skip to component 17.)
2.	Yes 🗌	No:	Was the most recent fiscal audit submitted to HUD?
3.	Yes 🖂	No:	Were there any findings as the result of that audit?
4.	Yes 🗌	No:	If there were any findings, do any remain unresolved?
			If yes, how many unresolved findings remain?
5.	Yes	No:	Have responses to any unresolved findings been submitted to
			HUD?
			If not, when are they due (state below)?

17. PHA Asset Management

[24 CFR Part 903.7 9 (q)]

Exemptions from component 17: Section 8 Only PHAs are not required to complete this component. High performing and small PHAs are not required to complete this component.

1. Yes No: Is the PHA engaging in any activities that will contribute to the long-term asset management of its public housing stock, including how the Agency will plan for long-term operating, capital investment, rehabilitation, modernization, disposition, and other needs that have not been addressed elsewhere in this PHA Plan?
 What types of asset management activities will the PHA undertake? (select all that apply) Not applicable Private management Development-based accounting Comprehensive stock assessment Other: (list below)
3. Yes No: Has the PHA included descriptions of asset management activities in the optional Public Housing Asset Management Table?
18. Other Information [24 CFR Part 903.7 9 (r)]
A. Resident Advisory Board Recommendations
1. Yes No: Did the PHA receive any comments on the PHA Plan from the Resident Advisory Board/s? Meetings were held at Michigan Court on 12/4/01; Palmetto Court on 11/29/01; Palmetto Court on 11/19/01; Southward Village on 11/19/01; Royal Palm Towers on11/13/01; and Flossie M. Riley Garden Apartments on 11/13/01.
2. If yes, the comments are: (if comments were received, the PHA MUST select one) Attached at Attachment (File name) Provided below:
Resident comments all concerned specific items such as improving floor coverings, prohibiting bike riding on sidewalks, looking into installing canopies
over entry doors; installing a gazebo or pavilion; ensuring smoke alarms work; removal or reconnection of old heater system; replacing faucets in bathrooms; training on how to use fire extinguishers; dryer hookups; broken playground equipment; removal of one-way signs; dirty bathtubs; installing speed bumps at C-Street and Delaware; installing GFI's in bathrooms; signage for Palmetto Court; fencing in various blocks with chain link fence; Teen-Parenting Counseling classes; range-hoods over stove area; and more lighting. Additionally, a three page written list of suggestions from a resident was also

3. In what manner did the PHA address those comments? (select all that apply) Considered comments, but determined that no changes to the PHA Plan were necessary. The PHA changed portions of the PHA Plan in response to comments List changes below: \boxtimes Other: (list below) All comments were reviewed and considered by staff and the Board Finance Committee in conjunction with developing the FY 2002 CFP and the 5-year CFP. B. Description of Election process for Residents on the PHA Board 1. \square Yes \bowtie No: Does the PHA meet the exemption criteria provided section 2(b)(2) of the U.S. Housing Act of 1937? (If no, continue to question 2; if yes, skip to sub-component C.) 2. Yes No: Was the resident who serves on the PHA Board elected by the residents? (If yes, continue to question 3; if no, skip to subcomponent C.) 3. Description of Resident Election Process a. Nomination of candidates for place on the ballot: (select all that apply) Candidates were nominated by resident and assisted family organizations Candidates could be nominated by any adult recipient of PHA assistance Self-nomination: Candidates registered with the PHA and requested a place on ballb X Other: (describe) Appointed by the Mayor b. Eligible candidates: (select one) Any recipient of PHA assistance Any head of household receiving PHA assistance Any adult recipient of PHA assistance Any adult member of a resident or assisted family organization Other (list) c. Eligible voters: (select all that apply) \boxtimes All adult recipients of PHA assistance (public housing and section 8 tenantbased assistance)

received concerning CPF expenditures. This memo and the minutes of the six

meetings are on file at the main office of the FMHA.

Representatives of all PHA resident and assisted family organizations Other (list)					
C. Statement of Consistency with the Consolidated Plan For each applicable Consolidated Plan, make the following statement (copy questions as many times as necessary).					
1. Consolidated Plan jurisdiction: (provide name here) CITY OF FORT MYERS					
2. The PHA has taken the following steps to ensure consistency of this PHA Plan with the Consolidated Plan for the jurisdiction: (select all that apply)					
 The PHA has based its statement of needs of families in the jurisdiction on the needs expressed in the Consolidated Plan/s. The PHA has participated in any consultation process organized and offered by the Consolidated Plan agency in the development of the Consolidated Plan. The PHA has consulted with the Consolidated Plan agency during the development of this PHA Plan. Activities to be undertaken by the PHA in the coming year are consistent with the initiatives contained in the Consolidated Plan. (list below) 					
Other: (list below)					
4. The Consolidated Plan of the jurisdiction supports the PHA Plan with the following actions and commitments: (describe below)					
The Consolidated Plan supports the PHA Plan by signing off on consistency with all Federal grants and by inviting PHA participation in planning process.					
D. Other Information Required by HUD					
Use this section to provide any additional information requested by HUD.					
Current Listing of Fort Myers Housing Authority Board of Commissioners					
Commissioner Appointed Term Ends					
Mark Morris, Chairman 04-01-01 03—6-03 First National Bank of Fort Myers					

Pastor Jonathan Gray, V. Chair Cornerstone Ministries	04-01-01	03-06-03
Ms. Betty McDonald (Resident) 4224 Michigan Avenue #217	04-01-01	03-06-05
Mr. Bill Barnwell Farmers Market Restaurant	04-01-01	03-06-05
Mr. Lemuel Teal 1656 Starnes Street	04-01-01	03-06-03
Mr. Peter Arroyo Catholic Charities	04-01-01	03-06-02
Mr. E. Bruce Strayhorn 02 Strayhorn & Strayhorn	03-07-98	03-06-

Current Listing of Resident Advisory Board of Southward Village Annex, Inc.

Mary Williams, President 3501 Dale Street, #C-13, Fort Myers, FL 33916

Ann English, Vice-President 4224 Michigan Ave., Fort Myers, FL 33916

Barbara Hail, Secretary 4258 Michigan Avenue, #1, Fort Myers, FL 33916

Sharia Spencer, Treasurer 4224 Michigan Ave #636, Fort Myers, FL 33916

Frances Saunders 4224 Michigan Ave #635, Fort Myers, FL 33916



Attachments

Use this section to provide any additional attachments referenced in the Plans.

Attachment files submitted electronically to HUD with this plan:

- (1) fl047a02.xls Capital Fund Tables for FY 2002 (FL14P04750102)
- (2) fl047b02.xls 5-Yr Capital Fund Tables FY 2002-2006
- (3) fl047c02.xls final report (12/31/01) for FY 2000 CFP Grant #FL 14P04750100
- (4) fl047d02.xls P & E Report (12/31/01) for FY 2001 CFP grant #FL14P04750101

PHA Plan Table Library

Componetent 7 Capital Fund Program Annual Statement Parts I, II, and II

Annual Statement

Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number:

FFY of Grant Approval: 04/2002

FL14P04750102

X Original Annual Statement

Line No.	Summary by Development Account	Tot	al Estimated
Line No.	Summary by Development Account		Cost
1	Total Non-CGP Funds		
2	1406 Operations	\$	150,000
3	1408 Management Improvements	\$	184,400
4	1410 Administration	\$	184,133
5	1411 Audit	\$	-
6	1415 Liquidated Damages	\$	-
7	1430 Fees and Costs	\$	42,000
8	1440 Site Acquisition	\$	-
9	1450 Site Improvement	\$	263,584
10	1460 Dwelling Structures	\$	862,500
11	1465.1 Dwelling Equipment-Nonexpendable	\$	90,000
12	1470 Nondwelling Structures	\$	120,800
13	1475 Nondwelling Equipment	\$	30,000
14	1485 Demolition	\$	-
15	1490 Replacement Reserve	\$	-
16	1492 Moving to Work Demonstration	\$	-
17	1495.1 Relocation Costs	\$	-
18	1498 Mod Used for Development	\$	-
19	1502 Contingency	\$	-
20	Amount of Annual Statement (Sum of lines 2-19)	\$	1,927,417
21	Amount of line 20 Related to LBP Activities	\$	-
22	Amount of line 20 Related to Section 504 Compliance	\$	-
23	Amount of line 20 Related to Security	\$	-
24	Amount of line 20 Related to Energy Conservation Measures	\$	-

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Total	Estimated Cost
FL047-001	Flooring	1460	\$	3,000
Southward	Roofs	1460	\$	50,000
Village	Ceiling Fans	1460	\$	10,000
	Total FL47-001 Southward Village		\$	63,000
FL047-002	Entry Canopy	1450	\$	3,000
Bonair Towers	Roofs	1460	\$	500
	Reconnect AC Drains	1460	\$	3,000
	Total FL47-002 Bonair Towers		\$	6,500
FL047-003	Flooring (50 units)	1460	\$	50,000
Palmetto Court	Roofs	1460	\$	1,000
Tamicuo Court	Install GFI's Bathrooms	1460	\$	15,000
	Total FL47-003 Palmetto Court	1400	\$	66,000
FI 047 004	D. C.	1460	¢	500
FL047-004	Roofs	1460	\$	500
Royal Palm Towers	A/C Drain Repair	1460	\$	3,000
	Replace Bathroom Lavatories	1460	\$	7,500
	ADA/504 Compliance Repair	1470	\$	20,000
	Total FL047-004		\$	31,000
FL047-006	Roofs	1460	\$	55,000
Michigan Court	Modernization (family - 100 units)	1460	\$	306,000
Ü	Flooring (FMRGA)	1460	\$	30,000
	Emergency Lights (FMRGA)	1460	\$	40,000
	ADA/504 Compliance	1470	\$	25,000
	Total FL047-006		\$	456,000
PHA Wide	Operations	1406	\$	150,000
PHA Wide	Computer software and support	1408	\$	73,000
PHA Wide	Resident Initiatives	1408	\$	50,000
PHA Wide	Operational Improvements	1408	\$	40,000
PHA Wide	Training	1408	\$	15,000
PHA Wide	HTVN	1408	\$	6,400
PHA Wide	Moderinzation Coordinator	1410	\$	52,000
PHA Wide	Moderinzation Assistant	1410	\$	52,000
PHA Wide	Modernization Office Clerk	1410	\$	17,718
PHA Wide	HQS Inspector	1410	\$	30,000
PHA Wide	Employee Benefits	1410	\$	29,915
PHA Wide	Modernization Office Supplies	1410	\$	2,500
PHA Wide	Fees and Costs	1430	\$	40,000
PHA Wide	Project Costs	1430	\$	2,000
PHA Wide	Landscaping	1450	\$	120,584
PHA Wide	Security/Site Lighting	1450	\$	40,000
PHA Wide	Recreational Facilities	1450	\$	50,000
PHA Wide	Site Improvement	1450	\$	50,000

PHA Wide	Interior/Exterior Painting	1460	\$ 200,000
PHA Wide	Prep units for Occupancy	1460	\$ 88,000
PHA Wide	Appliances	1465	\$ 90,000
PHA Wide	Admin. Bldg. Renov.	1470	\$ 45,800
PHA Wide	Resident Community Areas	1470	\$ 30,000
PHA Wide	Computer Equipment	1475	\$ 30,000
	Total PHA Wide		\$ 1,304,917
	Capital Fund Program FFY2002 Total		\$ 1,927,417

Annual Statement

Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name	All Funds Obligated (Quarter	All Funds Expended (Quarter
HA-Wide Activities	Ending Date)	Ending Date)
FL047-001 Southward Village	April-04	
-	-	
FL047-002 Bonair Towers	April-04	
FL047-003 Palmetto Court	April-04	
FL047-004 Royal Palm Towers	April-04	
FL047-006 Michigan Court	April-04	
PHA WIDE		
1406	April-04	
1408	April-04	
1410	1	
1430	April-04	
1450	April-04	
1460	April-04	
1465	April-04	
1470	April-04	
1475	April-04	

Part I: Summary

PHA Name: Housing Author	rity of the City					X	Original 5-Year Plan		
of Fort Myers Florida							Revision No:		
Development Number/Name/HA-Wide	Year 1	Work Statement Grant: 2003 2004	for Year 2 FFY PHA FFY:	Work Statemen Grant: 2004 2005	t for Year 3 FFY PHA FFY:	Work S Grant: 2006	Statement for Year 4 FFY 2005 PHA FFY:	Work Stateme Grant: 2006 2007	ent for Year 5 FFY PHA FFY:
	Annual Statement								
FL47-001 Southward Village		\$	230,000	\$	306,000	\$	230,000	\$	200,000
FL47-002 Bonair Towers		\$	26,500	\$	30,500	\$	33,740	\$	241,526
FL47-003 Palmetto Court		\$	1,000	\$	36,000	\$	1,000	\$	1,000
FL47-004 Royal Palm Towers		\$	20,500	\$	500	\$	500	\$	500
FL47-006 Michigan Court		\$	428,422	\$	368,067	\$	334,953	\$	325,750
PHA Wide		\$	1,220,995	\$	1,186,350	\$	1,327,224	\$	1,158,641
CFP Funds Listed for 5- year planning		\$	1,927,417	\$	1,927,417	\$	1,927,417	\$	1,927,417
Replacement Housing Factor Funds									

Part II: Supporting Pages - Work Activites

Activites for Year 1	A	Activities for Year: 2003 FFY Grant: 2003 PHA FY: 2004			A	ctivities for Year: 3 FFY Grant: 2004 PHA FY: 2005	
	Development	Major Work Categories	Es	stimated Cost	Development	Major Work Categories	Estimated Cost
	Name/Number FL047-001				Name/Number FL047-001 Southward		
See	Southward Village	Roofs	\$	150,000	Village	Roofs	\$ 200,000
Annual	FL047-001 Southward Village	Flooring	\$	50,000	FL047-001 Southward Village	Flooring	\$ 70,000
Statement	FL047-001 Southward Village	Ceiling Fans	\$	10,000	FL047-001 Southward Village	Bathtubs	\$ 20,000
	FL047-001 Southward Village	Bathtubs	\$	20,000	FL047-001 Southward Village	Repair Kitchen Wall	\$ 16,000
	FL047-002 Bonair Towers	Roofs	\$	500	FL047-002 Bonair Towers	Roofs	\$ 500
	FL047-002 Bonair Towers	Air Condition Bedrooms	\$	6,000	FL047-002 Bonair Towers	Window Replacement	\$ 30,000
	FL047-002 Bonair Towers	Entry Intercom System	\$	20,000	FL047-003 Palmetto Court	Roofs	\$ 1,000
	FL047-003 Palmetto Court	Roofs	\$	1,000	FL047-003 Palmetto Court	Bathroom Vanities	\$ 20,000
	FL047-004 Royal Palm Towers	Roofs	\$	500	FL047-003 Palmetto Court	Rangehoods	\$ 15,000
	FL047-004 Royal Palm Towers	Entry Intercom System	\$	20,000	FL047-004 Royal Palm Towers	Roofs	\$ 500
	FL047-006 Michigan Court	Roofs	\$	198,422	FL047-006 Michigan Court	Roofs	\$ 198,067
	FL047-006 Michigan Court	Modernization (Family 100 Units)	\$	200,000	FL047-006 Michigan Court	Modernization (Family 100 Units)	\$ 170,000
	FL047-006 Michigan Court	Flooring (FMRGA)	\$	30,000			
	PHA Wide	Operations	\$	125,000	PHA Wide	Operations	\$ 100,000
	PHA Wide	Computer Software/Support	\$		PHA Wide	Computer Software/Support	\$ 73,000
	PHA Wide	Resident Initiatives	\$	50,000	PHA Wide	Resident Initiatives	\$ 50,000
	PHA Wide	Operational Improvements	\$	40,000	PHA Wide	Operational Improvements	\$ 40,000
	PHA Wide	Training	\$	15,000	PHA Wide	Training	\$ 15,000
	PHA Wide	HTVN	\$	6,400	PHA Wide	HTVN	\$ 6,400
	PHA Wide	Modernization Coordinator	\$	54,600	PHA Wide	Modernization Coordinator	\$ 57,330
	PHA Wide						
	Т	Total CFP Estimated Cost	\$	1,070,422			\$ 1,082,797

Part II: Supporting Pages - Work Activites

Activites for Year 1		Activities for Year:2_ FFY Grant: 2003 PHA FY: 2004	_		Activities for Year: 3 FFY Grant: 2004 PHA FY: 2005	
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories	Estimated Cost
See	PHA Wide	Modernization Assistant	\$ 54,600	PHA Wide	Modernization Assistant	\$ 57,330
Annual	PHA Wide	Modernization Office Clerk	\$ 18,604	PHA Wide	Modernization Office Clerk	\$ 19,534
Statement	PHA Wide	HQS Inspector	\$ 31,500	PHA Wide	HQS Inspector	\$ 33,075
	PHA Wide	Employee Benefits	\$ 47,791	PHA Wide	Employee Benefits	\$ 50,181
	PHA Wide	Modernization Office Supplies	\$ 2,500	PHA Wide	Modernization Office Supplies	\$ 2,500
	PHA Wide	Fees and Costs	\$ 40,000	PHA Wide	Fees and Costs	\$ 40,000
	PHA Wide	Project Costs	\$ 2,000	PHA Wide	Project Costs	\$ 2,000
	PHA Wide	Landscaping	\$ 100,000	PHA Wide	Landscaping	\$ 100,000
	PHA Wide	Site/Security Lighting	\$ 20,000	PHA Wide	Site/Security Lighting	\$ 20,000
	PHA Wide	Recreational Facilities	\$ 20,000	PHA Wide	Recreational Facilities	\$ 20,000
	PHA Wide	Site Improvement	\$ 50,000	PHA Wide	Site Improvement	\$ 50,000
	PHA Wide	Int/Exterior Painting	\$ 200,000	PHA Wide	Int/Exterior Painting	\$ 200,000
	PHA Wide	Prep Units for Occupancy	\$ 100,000	PHA Wide	Prep Units for Occupancy	\$ 100,000
	PHA Wide	Appliances	\$ 90,000	PHA Wide	Appliances	\$ 90,000
	PHA Wide	Admin Bldg. Renov.	\$ 45,000	PHA Wide	Admin Bldg. Renov.	\$ 25,000
	PHA Wide	Resident Common Areas	\$ 20,000	PHA Wide	Resident Common Areas	\$ 20,000
	PHA Wide	Computer Equipment	\$ 15,000	PHA Wide	Computer Equipment	\$ 15,000
	,	Total CFP Estimated Cost	\$ 1,927,417			\$ 1,927,417

Part II: Supporting Pages - Work Activites

Activites for Year 1	A	Activities for Year:4_ FFY Grant: 2005 PHA FY: 2006	-	Ac	tivities for Year:5_ FFY Grant: 2006 PHA FY: 2007	FFY Grant: 2006 PHA FY: 2007						
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories		Estimated Cost					
See	FL47-001 Southward Village	Roofs	\$ 230,000	FL47-001 Southward Village	Roofs	\$	200,000					
Annual	FL47-002 Bonair Towers	Roofs	\$ 500	FL47-002 Bonair Towers	Roofs	\$	500					
Statement	FL47-002 Bonair Towers	Window Replacement	\$ 33,240	FL47-002 Bonair Towers	Window Replacement	\$	241,026					
	FL047-003 Palmetto Court	Roofs	\$ 1,000	FL047-003 Palmetto Court	Roofs	\$	1,000					
	FL047-004 Royal Palm Towers	Roofs	\$ 500	FL047-004 Royal Palm Towers	Roofs	\$	500					
	FL047-006 Michigan Court	Roofs	\$ 334,953	FL047-006 Michigan Court	Roofs	\$	325,750					
	PHA Wide	Operations	\$ 75,000	PHA Wide	Operations	\$	50,000					
	PHA Wide	Computer Software/Support	\$ 73,000	PHA Wide	Computer Software/Support	\$	73,000					
	PHA Wide	Resident Initiatives	\$ 50,000	PHA Wide	Resident Initiatives	\$	50,000					
	PHA Wide	Operational Improvements	\$ 40,000	PHA Wide	Operational Improvements	\$	40,000					
	PHA Wide	Training	\$ 15,000	PHA Wide	Training	\$	15,000					
	PHA Wide	HTVN	\$ 6,400	PHA Wide	HTVN	\$	6,400					
	PHA Wide	Modernization Coord.	\$ 60,197	PHA Wide	Modernization Coord.	\$	63,207					
	PHA Wide	Modernization Asst.	\$ 60,197	PHA Wide	Modernization Asst.	\$	63,207					
	PHA Wide	Modernization Office Clerk	\$ 20,511	PHA Wide	Modernization Office Clerk	\$	21,537					
	PHA Wide	HQS Inspector	\$ 34,729	PHA Wide	HQS Inspector	\$	36,465					
	PHA Wide	Employee Benefits	\$ 52,690	PHA Wide	Employee Benefits	\$	55,325					
	PHA Wide	Modernization office supplies	\$ 2,500	PHA Wide	Modernization office supplies	\$	2,500					
	PHA Wide	Fees and Costs	\$ 40,000	PHA Wide	Fees and Costs	\$	40,000					
	PHA Wide	Project Costs	\$ 2,000	PHA Wide	Project Costs	\$	2,000					
	PHA Wide	Landscaping	\$ 150,000	PHA Wide	Landscaping	\$	100,000					
	PHA Wide	Site/Security Lighting	\$ 30,000	PHA Wide	Site/Security Lighting	\$	20,000					
	PHA Wide	Recreation Facilities	\$ 40,000	PHA Wide	Recreation Facilities	\$	20,000					
	PHA Wide	Site Improvement	\$ 70,000	PHA Wide	Site Improvement	\$	50,000					
	7	Total CFP Estimated Cost	\$ 1,422,417			\$	1,477,417					

Activites for Year 1	,	Activities for Year:4 FFY Grant: 2005 PHA FY: 2006	Activities for Year:5 FFY Grant: 2006 PHA FY: 2007					
	Development Name/Number	Major Work Categories	Estimated Cost	Development Name/Number	Major Work Categories		Estimated Cost	
See	PHA Wide	Interior/Exterior Painting	\$ 200,000	PHA Wide	Interior/Exterior Painting	\$	200,000	
Annual	PHA Wide	Prep Units for Occupancy	\$ 100,000	PHA Wide	Prep Units for Occupancy	\$	100,000	
Statement	PHA Wide	Appliances	\$ 90,000	PHA Wide	Appliances	\$	90,000	
	PHA Wide	Admin Bldg. Renov	\$ 50,000	PHA Wide	Admin Bldg. Renov	\$	25,000	
	PHA Wide	Resident Common Areas	\$ 50,000	PHA Wide	Resident Common Areas	\$	20,000	
		Computer Equipment	\$ 15,000	PHA Wide	Computer Equipment	\$	15,000	
-	,	Total CFP Estimated Cost	\$ 1,927,417			\$	1,927,417	

PHA Plan Table Library

Componetent 7 Capital Fund Program Annual Statement Parts I, II, and II

Annual Statement

Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number:

FFY of Grant Approval: 04/2000

FL14P04750100

X Revision No. 2 Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$ 377,779.00
3	1408 Management Improvements	\$ 173,400.00
4	1410 Administration	\$ 122,192.78
5	1411 Audit	\$0.00
6	1415 Liquidated Damages	\$0.00
7	1430 Fees and Costs	\$ 24,778.29
8	1440 Site Acquisition	\$0.00
9	1450 Site Improvement	\$ 151,499.00
10	1460 Dwelling Structures	\$ 764,734.85
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 73,621.83
12	1470 Nondwelling Structures	\$ 170,889.25
13	1475 Nondwelling Equipment	\$ 30,000.00
14	1485 Demolition	\$0.00
15	1490 Replacement Reserve	\$0.00
16	1492 Moving to Work Demonstration	\$0.00
17	1495.1 Relocation Costs	\$0.00
18	1498 Mod Used for Development	\$0.00
19	1502 Contingency	\$0.00
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,888,895.00
21	Amount of line 20 Related to LBP Activities	\$0.00
22	Amount of line 20 Related to Section 504 Compliance	\$0.00
23	Amount of line 20 Related to Security	\$0.00
24	Amount of line 20 Related to Energy Conservation Measures	\$0.00

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Budget Rev. #1	Rev	rision No2_	Obilgated Amount	Expended Amount	Project Status
FL047-001	Flooring Bathrooms	1460	\$69,000.00	\$	21,110.21	\$21,110.21	\$21,110.21	completed 09/2001
Southward	Roofs	1460	\$25,277.00	\$	-	\$0.00	\$0.00	realign fund to cover expenses
Village	Interior Painting	1460	\$25,000.00	\$	15,405.00	\$15,405.00	\$15,405.00	completed 09/2001
	Window Repair	1460	\$8,000.00	\$	25,524.84	\$25,524.84	\$25,524.84	phase completed 09/2001, on-going in CFP FY2001
	Carrie Robinson Center - ADA Restrooms	1470	\$10,000.00	\$	7,641.26	\$7,641.26	\$7,641.26	completed 03/2001
	Total FL47-001 Southward Village		\$137,277.00	\$	69,681.31	\$69,681.31	\$69,681.31	
FL047-002	Roof	1460	\$70,000.00	\$	64,151.51	\$64,151.51	\$60,560.51	
Bonair Towers	Interior Painting	1460	\$15,000.00	\$	21,464.96	\$21,464.96	\$21,464.96	completed 09/2001
	Plumbing	1460	\$24,975.00	\$	25,009.58	\$25,009.58	\$25,009.58	completed 09/2001
	Door Repair	1460	\$3,000.00	\$	3,545.20	\$3,545.20	\$3,545.20	completed 09/2001
	Total FL47-002 Bonair Towers		\$112,975.00	\$	114,171.25	\$114,171.25	\$110,580.25	
FL047-003	Irrigation Sprinkler System	1450	\$20,000.00	\$	317.45	\$317.45	\$317.45	completed 03/2001
Palmetto Court	Roof	1460	\$5,000.00	\$	-	\$0.00	\$0.00	realign funds to cover expenses
	Interior Painting	1460	\$20,576.00	\$	13,051.79	\$13,051.79	\$13,051.79	completed 09/2001
	Repair Sewer Lines	1470	\$13,500.00	\$	17,375.00	\$17,375.00	\$17,375.00	completed 03/2001
	Total FL47-003 Palmetto Court		\$59,076.00	\$	30,744.24	\$ 30,744.24	\$ 30,744.24	
FL047-004	Roof	1460	\$65,000.00	\$	66,600.90	\$66,600.90	\$65,700.90	
Royal Palm Towers	Interior Painting	1460	\$20,576.00	\$	8,600.00	\$8,600.00	\$8,600.00	completed 03/2001
	Plumbing	1460	\$28,000.00	\$	45,572.31	\$45,572.31	\$45,572.31	completed 03/2001
	Window Repair	1460	\$20,000.00	\$	3,926.00	\$3,926.00	\$3,926.00	phase completed on-going in CFP FY2001
	Total FL047-004		\$133,576.00	\$	124,699.21	\$ 124,699.21	\$ 123,799.21	
FL047-006	Roofs - (Elderly/Family)	1460	\$8,424.00	\$	_	\$0.00	\$0.00	realign funds to cover expenses
Michigan Court	Bathroom Modernization	1460	\$107,294.00	\$	123,262.76	\$123,262.76	\$123,262.76	This phase complete, on-going in CFP FY2001
<u> </u>	Interior Painting	1460	\$97,120.00	\$	147,283.22	\$147,283.22	\$147,283.22	This phase complete, on-going in CFP FY2001
	Sewer Line Repair (elderly)	1460	\$15,000.00	\$	13,669.93	\$13,669.93	\$13,669.93	completed 06/2001
	Renovate 700 block	1460	\$47,795.00	_	-	\$0.00	\$0.00	realign funds to cover expenses
	Total FL047-006		\$275,633.00	\$	284,215.91	\$ 284,215.91	\$ 284,215.91	

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Budget Revision #1	Rev	Revision No2_		Obligated Amount	Expe	ended Amount	Project Status
PHA Wide	Operations	1406	\$377,779.00	\$	377,779.00		\$377,779.00		\$377,779.00	completed 03/2001
	Computer software and support	1408	\$45,000.00	\$	45,100.00		\$45,100.00		\$45,100.00	completed 09/2001
	Resident Initiatives	1408	\$50,000.00	\$	50,000.00		\$50,000.00		\$50,000.00	completed 09/2001
	Operational Improvements	1408	\$52,000.00	\$	52,000.00		\$52,000.00		\$52,000.00	completed 09/2001
	Training	1408	\$20,000.00	\$	20,000.00		\$20,000.00		\$20,000.00	completed 09/2001
	HTVN	1408	\$6,400.00	\$	6,300.00		\$6,300.00		\$6,300.00	completed 09/2001
	Moderinzation Coordinator	1410	\$56,669.00	\$	60,004.58		\$60,004.58		\$60,004.58	completed 09/2001, on-going in CFP FY 2001
	Moderinzation Assistant	1410	\$37,706.00	\$	35,144.01		\$35,144.01		\$35,144.01	completed 09/2001, on-going in CFP FY 2001
	Employee Benefits	1410	\$14,685.00	\$	6,343.86		\$6,343.86		\$6,343.86	completed 09/2001, on-going in CFP FY 2001
	HQS Inspector	1410	\$22,000.00	\$	19,416.55		\$19,416.55		\$19,416.55	completed 09/2001, on-going in CFP FY 2001
	Sundries	1410	\$2,500.00	\$	1,283.78		\$1,283.78		\$1,283.78	completed 09/2001, on-going in CFP FY 2001
	Fees and Costs	1430	\$40,000.00	\$	24,778.29		\$24,778.29		\$24,778.29	completed 09/2001
	Landscaping	1450	\$100,000.00	\$	130,462.99		\$130,462.99		\$130,462.99	completed 09/2001, on-going in CFP FY 2001
	Recreational Facilities	1450	\$21,499.00	\$	20,718.56		\$20,718.56		\$20,718.56	completed 09/2001
	Prep units for Occupancy	1460	\$71,000.00	\$	164,275.38		\$164,275.38		\$164,275.38	phase completed 09/2001, on-going in CFP FY 2001
	GFI Replacement	1460	\$2,162.75	\$	2,281.26		\$2,281.26		\$2,281.26	completed 03/2001
	Appliances	1465	\$73,568.00	\$	73,621.83		\$73,621.83		\$73,621.83	phase completed 09/2001, on-going in CFP FY 2001
	Administration Bldg. Renovations	1470	\$147,389.25	\$	145,872.99		\$145,872.99		\$145,872.99	phase completed 09/2001, on-going in CFP FY 2001
	Computer Equipment	1475	\$30,000.00	\$	30,000.00		\$30,000.00		\$30,000.00	phase completed 09/2001, on-going in CFP FY 2001
	Total PHA Wide		\$1,170,358.00	\$	1,265,383.08	\$	1,265,383.08	\$	1,265,383.08	
	Capital Fund Program FFY2000 Total		\$1,888,895.00	\$	1,888,895.00	\$	1,888,895.00	\$	1,884,404.00	

Annual Statement Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name	All Funds Obligated (Quarter	All Funds Expended (Quarter
HA-Wide Activities	Ending Date)	Ending Date)
FL047-001 Southward Village	April-02	September-01
-		
FL047-002 Bonair Towers	April-02	
FL047-003 Palmetto Court	April-02	September-01
FL047-004 Royal Palm Towers	April-02	
FL047-006 Michigan Court	April-02	September-01
PHA WIDE		
1406	April-02	September-01
1408	April-02	September-01
1410	April-02	September-01
1430	April-02	September-01
1450	April-02	September-01
1460	April-02	September-01
1465	April-02	September-01
1470	April-02	September-01
1475	April-02	September-01

PHA Plan Table Library

Componetent 7 Capital Fund Program Annual Statement Parts I, II, and II

Annual Statement

Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number:

FFY of Grant Approval: 04/2000

FL14P04750100

X Revision No. 2 Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$ 377,779.00
3	1408 Management Improvements	\$ 173,400.00
4	1410 Administration	\$ 122,192.78
5	1411 Audit	\$0.00
6	1415 Liquidated Damages	\$0.00
7	1430 Fees and Costs	\$ 24,778.29
8	1440 Site Acquisition	\$0.00
9	1450 Site Improvement	\$ 151,499.00
10	1460 Dwelling Structures	\$ 764,734.85
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 73,621.83
12	1470 Nondwelling Structures	\$ 170,889.25
13	1475 Nondwelling Equipment	\$ 30,000.00
14	1485 Demolition	\$0.00
15	1490 Replacement Reserve	\$0.00
16	1492 Moving to Work Demonstration	\$0.00
17	1495.1 Relocation Costs	\$0.00
18	1498 Mod Used for Development	\$0.00
19	1502 Contingency	\$0.00
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,888,895.00
21	Amount of line 20 Related to LBP Activities	\$0.00
22	Amount of line 20 Related to Section 504 Compliance	\$0.00
23	Amount of line 20 Related to Security	\$0.00
24	Amount of line 20 Related to Energy Conservation Measures	\$0.00

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Budget Rev. #1	Rev	rision No2_	Obilgated Amount	Expended Amount	Project Status
FL047-001	Flooring Bathrooms	1460	\$69,000.00	\$	21,110.21	\$21,110.21	\$21,110.21	completed 09/2001
Southward	Roofs	1460	\$25,277.00	\$	-	\$0.00	\$0.00	realign fund to cover expenses
Village	Interior Painting	1460	\$25,000.00	\$	15,405.00	\$15,405.00	\$15,405.00	completed 09/2001
	Window Repair	1460	\$8,000.00	\$	25,524.84	\$25,524.84	\$25,524.84	phase completed 09/2001, on-going in CFP FY2001
	Carrie Robinson Center - ADA Restrooms	1470	\$10,000.00	\$	7,641.26	\$7,641.26	\$7,641.26	completed 03/2001
	Total FL47-001 Southward Village		\$137,277.00	\$	69,681.31	\$69,681.31	\$69,681.31	
FL047-002	Roof	1460	\$70,000.00	\$	64,151.51	\$64,151.51	\$60,560.51	
Bonair Towers	Interior Painting	1460	\$15,000.00	\$	21,464.96	\$21,464.96	\$21,464.96	completed 09/2001
	Plumbing	1460	\$24,975.00	\$	25,009.58	\$25,009.58	\$25,009.58	completed 09/2001
	Door Repair	1460	\$3,000.00	\$	3,545.20	\$3,545.20	\$3,545.20	completed 09/2001
	Total FL47-002 Bonair Towers		\$112,975.00	\$	114,171.25	\$114,171.25	\$110,580.25	
FL047-003	Irrigation Sprinkler System	1450	\$20,000.00	\$	317.45	\$317.45	\$317.45	completed 03/2001
Palmetto Court	Roof	1460	\$5,000.00	\$	-	\$0.00	\$0.00	realign funds to cover expenses
	Interior Painting	1460	\$20,576.00	\$	13,051.79	\$13,051.79	\$13,051.79	completed 09/2001
	Repair Sewer Lines	1470	\$13,500.00	\$	17,375.00	\$17,375.00	\$17,375.00	completed 03/2001
	Total FL47-003 Palmetto Court		\$59,076.00	\$	30,744.24	\$ 30,744.24	\$ 30,744.24	
FL047-004	Roof	1460	\$65,000.00	\$	66,600.90	\$66,600.90	\$65,700.90	
Royal Palm Towers	Interior Painting	1460	\$20,576.00	\$	8,600.00	\$8,600.00	\$8,600.00	completed 03/2001
	Plumbing	1460	\$28,000.00	\$	45,572.31	\$45,572.31	\$45,572.31	completed 03/2001
	Window Repair	1460	\$20,000.00	\$	3,926.00	\$3,926.00	\$3,926.00	phase completed on-going in CFP FY2001
	Total FL047-004		\$133,576.00	\$	124,699.21	\$ 124,699.21	\$ 123,799.21	
FL047-006	Roofs - (Elderly/Family)	1460	\$8,424.00	\$	_	\$0.00	\$0.00	realign funds to cover expenses
Michigan Court	Bathroom Modernization	1460	\$107,294.00	\$	123,262.76	\$123,262.76	\$123,262.76	This phase complete, on-going in CFP FY2001
<u> </u>	Interior Painting	1460	\$97,120.00	\$	147,283.22	\$147,283.22	\$147,283.22	This phase complete, on-going in CFP FY2001
	Sewer Line Repair (elderly)	1460	\$15,000.00	\$	13,669.93	\$13,669.93	\$13,669.93	completed 06/2001
	Renovate 700 block	1460	\$47,795.00	_	-	\$0.00	\$0.00	realign funds to cover expenses
	Total FL047-006		\$275,633.00	\$	284,215.91	\$ 284,215.91	\$ 284,215.91	

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Budget Revision #1	Rev	Revision No2_		Obligated Amount	Expe	ended Amount	Project Status
PHA Wide	Operations	1406	\$377,779.00	\$	377,779.00		\$377,779.00		\$377,779.00	completed 03/2001
	Computer software and support	1408	\$45,000.00	\$	45,100.00		\$45,100.00		\$45,100.00	completed 09/2001
	Resident Initiatives	1408	\$50,000.00	\$	50,000.00		\$50,000.00		\$50,000.00	completed 09/2001
	Operational Improvements	1408	\$52,000.00	\$	52,000.00		\$52,000.00		\$52,000.00	completed 09/2001
	Training	1408	\$20,000.00	\$	20,000.00		\$20,000.00		\$20,000.00	completed 09/2001
	HTVN	1408	\$6,400.00	\$	6,300.00		\$6,300.00		\$6,300.00	completed 09/2001
	Moderinzation Coordinator	1410	\$56,669.00	\$	60,004.58		\$60,004.58		\$60,004.58	completed 09/2001, on-going in CFP FY 2001
	Moderinzation Assistant	1410	\$37,706.00	\$	35,144.01		\$35,144.01		\$35,144.01	completed 09/2001, on-going in CFP FY 2001
	Employee Benefits	1410	\$14,685.00	\$	6,343.86		\$6,343.86		\$6,343.86	completed 09/2001, on-going in CFP FY 2001
	HQS Inspector	1410	\$22,000.00	\$	19,416.55		\$19,416.55		\$19,416.55	completed 09/2001, on-going in CFP FY 2001
	Sundries	1410	\$2,500.00	\$	1,283.78		\$1,283.78		\$1,283.78	completed 09/2001, on-going in CFP FY 2001
	Fees and Costs	1430	\$40,000.00	\$	24,778.29		\$24,778.29		\$24,778.29	completed 09/2001
	Landscaping	1450	\$100,000.00	\$	130,462.99		\$130,462.99		\$130,462.99	completed 09/2001, on-going in CFP FY 2001
	Recreational Facilities	1450	\$21,499.00	\$	20,718.56		\$20,718.56		\$20,718.56	completed 09/2001
	Prep units for Occupancy	1460	\$71,000.00	\$	164,275.38		\$164,275.38		\$164,275.38	phase completed 09/2001, on-going in CFP FY 2001
	GFI Replacement	1460	\$2,162.75	\$	2,281.26		\$2,281.26		\$2,281.26	completed 03/2001
	Appliances	1465	\$73,568.00	\$	73,621.83		\$73,621.83		\$73,621.83	phase completed 09/2001, on-going in CFP FY 2001
	Administration Bldg. Renovations	1470	\$147,389.25	\$	145,872.99		\$145,872.99		\$145,872.99	phase completed 09/2001, on-going in CFP FY 2001
	Computer Equipment	1475	\$30,000.00	\$	30,000.00		\$30,000.00		\$30,000.00	phase completed 09/2001, on-going in CFP FY 2001
	Total PHA Wide		\$1,170,358.00	\$	1,265,383.08	\$	1,265,383.08	\$	1,265,383.08	
	Capital Fund Program FFY2000 Total		\$1,888,895.00	\$	1,888,895.00	\$	1,888,895.00	\$	1,884,404.00	

Annual Statement Capital Fund Program (CFP) Part III: Implementation Schedule

Development Number/Name	All Funds Obligated (Quarter	All Funds Expended (Quarter
HA-Wide Activities	Ending Date)	Ending Date)
FL047-001 Southward Village	April-02	September-01
-		
FL047-002 Bonair Towers	April-02	
FL047-003 Palmetto Court	April-02	September-01
FL047-004 Royal Palm Towers	April-02	
FL047-006 Michigan Court	April-02	September-01
PHA WIDE		
1406	April-02	September-01
1408	April-02	September-01
1410	April-02	September-01
1430	April-02	September-01
1450	April-02	September-01
1460	April-02	September-01
1465	April-02	September-01
1470	April-02	September-01
1475	April-02	September-01

PHA Plan Table Library

Componetent 7 Capital Fund Program Annual Statement Parts I, II, III

Annual Statement

Capital Fund Program (CFP) Part I: Summary

Capital Fund Grant Number:

FFY of Grant Approval: <u>04/2001</u>

FL14P04750101

Revision No. __ Annual Statement

Line No.	Summary by Development Account	Total Estimated Cost
1	Total Non-CGP Funds	
2	1406 Operations	\$ 170,000.00
3	1408 Management Improvements	\$ 214,400.00
4	1410 Administration	\$ 155,500.00
5	1411 Audit	\$0.00
6	1415 Liquidated Damages	\$0.00
7	1430 Fees and Costs	\$ 42,000.00
8	1440 Site Acquisition	\$0.00
9	1450 Site Improvement	\$ 392,067.00
10	1460 Dwelling Structures	\$ 674,450.00
11	1465.1 Dwelling Equipment-Nonexpendable	\$ 90,000.00
12	1470 Nondwelling Structures	\$ 159,000.00
13	1475 Nondwelling Equipment	\$ 30,000.00
14	1485 Demolition	\$0.00
15	1490 Replacement Reserve	\$0.00
16	1492 Moving to Work Demonstration	\$0.00
17	1495.1 Relocation Costs	\$0.00
18	1498 Mod Used for Development	\$0.00
19	1502 Contingency	\$0.00
20	Amount of Annual Statement (Sum of lines 2-19)	\$ 1,927,417.00
21	Amount of line 20 Related to LBP Activities	\$0.00
22	Amount of line 20 Related to Section 504 Compliance	\$0.00
23	Amount of line 20 Related to Security	\$0.00
24	Amount of line 20 Related to Energy Conservation Measures	\$0.00

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Original Budget	Rev	vision No1_	Obilgated Amount	Expended Amount	Project Status
FL047-001	Bathrooms	1460	\$100,000.00	\$	-	\$0.00	\$0.00	funds realigned
Southward	Flooring	1460	\$60,000.00	\$	70,000.00	\$0.00	\$0.00	in scheduling process
Village								
	Total FL47-001 Southward Village		\$160,000.00	\$	70,000.00	\$0.00	\$0.00	
FL047-002	Roof	1460	\$500.00	\$	500.00	\$0.00	\$0.00	
Bonair Towers	Bathroom Renovations	1460	\$49,921.00	\$	-	\$0.00	\$0.00	funds realigned
	Building Surge Protectiion	1460	\$0.00	\$	1,975.00	\$1,975.00	\$1,975.00	completed 12/2001
	Repair Kitchen Cabinets	1460	\$0.00	\$	10,000.00	\$0.00	\$0.00	material on order
	Change Locks	1460	\$0.00	\$	5,000.00	\$0.00	\$0.00	locks on order
	Window Repair	1460	\$102,000.00	\$	-	\$0.00	\$0.00	funds realigned
	AD/504 Compliance Repairs	1470	\$0.00	\$	8,000.00	\$0.00	\$0.00	in drawing/engineering stage
	Total FL47-002 Bonair Towers		\$152,421.00	\$	25,475.00	\$1,975.00	\$1,975.00	
FL047-003	Roof	1460	\$1,500.00	\$	1,500.00	\$0.00	\$0.00	
Palmetto Court	Bathroom Renovations	1460	\$50,000.00	\$	-	\$0.00	\$0.00	funds realigned
	Flooring (50 units)	1460	\$0.00	\$	75,000.00	\$0.00	\$0.00	work in process
	Total FL47-003 Palmetto Court		\$51,500.00	\$	76,500.00	\$0.00	\$0.00	
FL047-004	Roof	1460	\$500.00	\$	500.00	\$0.00	\$0.00	
Royal Palm Towers	Window Repair	1460	\$50,000.00	\$	23,000.00	\$23,000.00	\$22,067.72	completed 11/2001
	Building Surge Protection	1460	\$0.00	\$	1,975.00	\$1,975.00	\$1,975.00	completed 12/2001
	Repair Kitchen Cabinets	1460	\$0.00	\$	10,000.00	\$0.00	\$0.00	material on order
	Change Locks	1460	\$0.00	\$	5,000.00	\$0.00	\$0.00	locks on order
	Bathroom Renovations	1460	\$50,000.00	\$	-	\$0.00	\$0.00	funds realined
	AD/504 Compliance Repairs	1470	\$0.00	\$	19,000.00	\$0.00	\$0.00	in drawing/engineering stage
	Total FL047-004		\$100,500.00	\$	59,475.00	\$24,975.00	\$24,042.72	
FL047-006	Roofs - (Elderly/Family)	1460	\$116,295.00	\$	20,000.00	\$0.00	\$0.00	
Michigan Court	Bathroom Modernization	1460	\$100,000.00	\$	200,000.00	\$140,000.00	\$137,766.36	work in progress, approx 75 units completed
	Screen Doors (FMRGA)	1460	\$0.00	_	12,000.00	\$0.00		material on order
	AD/504 Compliance Repairs	1470	\$0.00	\$	37,000.00	\$0.00	\$0.00	in drawing/engineering stage
	Total FL047-006		\$216,295.00	\$	269,000.00	\$140,000.00	\$137,766.36	

Development Number/Name HA-Wide Activities	General Description of Major Work Categories	Development Account Number	Original Budget	Rev	vision No1_	Obilgated Amount	Expended Amount	Project Status
PHA Wide	Operations	1406	\$377,779.00	\$	170,000.00	\$50,000.00	\$14,889.03	in progress
PHA Wide	Computer software and support	1408	\$48,000.00	\$	73,000.00	\$20,000.00	\$17,741.54	in progress
PHA Wide	Resident Initiatives	1408	\$75,000.00	\$	50,000.00	\$30,000.00	\$25,325.64	in progress
PHA Wide	Operational Improvements	1408	\$40,000.00	\$	60,000.00	\$30,000.00	\$28,107.10	in progress
PHA Wide	Training	1408	\$15,000.00	\$	25,000.00	\$8,000.00	\$6,607.95	in progress
PHA Wide	HTVN	1408	\$6,400.00	\$	6,400.00	\$0.00	\$0.00	
PHA Wide	Moderinzation Coordinator	1410	\$59,000.00	\$	59,000.00	\$25,000.00	\$18,278.29	in progress
PHA Wide	Moderinzation Assistant	1410	\$40,000.00	\$	52,000.00	\$25,000.00	\$17,582.48	in progress
PHA Wide	HQS Inspector	1410	\$27,000.00	\$	27,000.00	\$15,000.00	\$8,050.33	in progress
PHA Wide	Employee Benefits	1410	\$15,000.00	\$	15,000.00	\$10,000.00	\$6,518.82	in progress
PHA Wide	Sundries	1410	\$5,000.00	\$	2,500.00	\$1,000.00	\$510.78	in progress
PHA Wide	Fees and Costs	1430	\$40,000.00	\$	40,000.00	\$5,000.00	\$4,945.45	in progress
PHA Wide	Project Costs	1430	\$2,000.00	\$	2,000.00	\$0.00	\$0.00	
PHA Wide	Landscaping	1450	\$73,522.00	\$	213,522.00	\$150,000.00	\$127,305.51	in progress
PHA Wide	Security/Site Lighting	1450	\$20,000.00	\$	40,000.00	\$28,000.00	\$26,219.12	in progress
PHA Wide	Recreational Facilities	1450	\$20,000.00	\$	40,000.00	\$30,000.00	\$29,516.65	in progress
PHA Wide	Site Improvement	1450	\$0.00	\$	98,545.00	\$0.00	\$0.00	in drawing/engineering stage
PHA Wide	Interior/Exterior Painting	1460	\$150,000.00	\$	150,000.00	\$90,000.00	\$85,517.72	in progress
PHA Wide	Prep units for Occupancy	1460	\$88,000.00	\$	88,000.00	\$35,000.00	\$34,642.50	in progress
PHA Wide	Appliances	1465	\$90,000.00	\$	90,000.00	\$75,000.00	\$73,381.00	in progress
PHA Wide	Administration Bldg. Renovations	1470	\$20,000.00	\$	45,000.00	\$10,000.00	\$8,501.27	in progress
PHA Wide	Resident Common Areas	1470	\$20,000.00	\$	50,000.00	\$10,000.00	\$9,368.57	in progress
PHA Wide	Computer Equipment	1475	\$15,000.00	\$	30,000.00	\$20,000.00	\$17,358.20	in progress
	Total PHA Wide		\$1,246,701.00	\$	1,426,967.00	\$ 667,000.00	\$ 560,367.95	
	Capital Fund Program FFY2001 Total		\$1,927,417.00	\$	1,927,417.00	\$833,950.00	\$724,152.03	

Development Number/Name	All Funds Obligated (Quarter	Ending Date)			
HA-Wide Activities	Ending Date)				
FL047-001 Southward Village	April-03				
FL047-002 Bonair Towers	April-03				
FL047-003 Palmetto Court	April-03				
FL047-004 Royal Palm Towers	April-03				
FL047-006 Michigan Court	April-03				
PHA WIDE					
1406	April-03				
1408	April-03				
1410	April-03				
1430	April-03				
1450	April-03				
1460	April-03				
1465					
1470					
1475	April-03				
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